U.S. Environmental Protection Agency

Grants Tracking and Reporting System

GRTS Web User Guide

Document::	
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Contract:	EPA BPA OARMSC-SYS-04

Revision History

Version	Description of Changes	Date	Author	Reviewer(s)
1.0	Initial Version	6/7/06	Donna Leader	EJ Grom Sujatha Chandra
1.1	Edit/Update	7/12/06	Donna Leader	EJ Grom

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Introduction

Background

In an effort to simplify the process of tracking Nonpoint Source (NPS) grants, a web based Oracle HTMLDB application was developed incorporating the data and functionality of the previous systems into a conveniently accessible web based tracking system. The NPS *Grants Reporting and Tracking System* (GRTS) allows users at the national, regional, and state levels to view, update and enter information relevant to NPS projects.

The security in GRTS allows for different role definitions for users depending on access level. These user roles include:

- ✓ *Administrator* – Full privileges including create user accounts
- ✓ *Region User Update* – Privileges to update, edit, and view *Region* records
- ✓ *Region User Read* – View only privileges for *Region* records
- ✓ *State User Update* – Privileges to update, edit, and view *State* records
- ✓ *State User Read* – View only privileges for *State* records
- ✓ *Guest* – View only privileges for Project records

Note: Users with *View Only* privileges cannot access *Pre-Award* information.

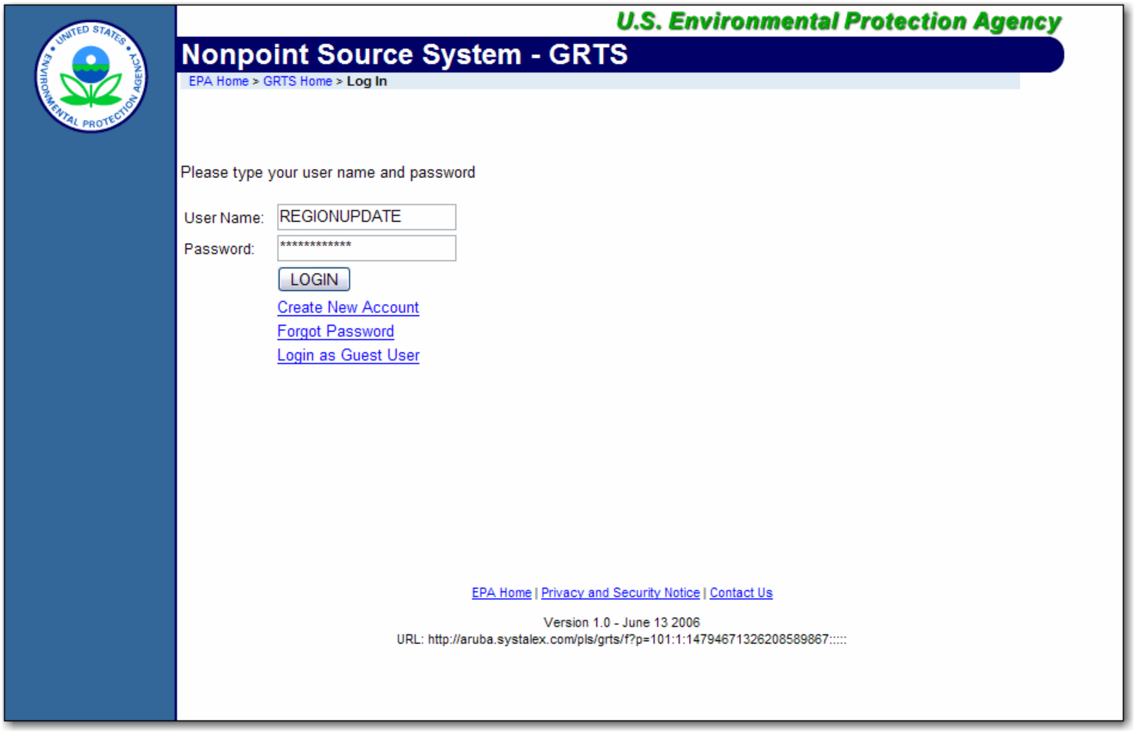
Scope

This document presents the user with instructions for using the GRTS Web application, including field definitions, navigation, and overall functionality.

Accessing GRTS Web Application

To access the GRTS Web application, open a browser and enter the address provided by EPA RTP. This will open the GRTS application and display the login page.

Logging In to GRTS Web



Field Name / Options	Description
User Name	The user name provided by the System Administrator
Password	The password provided **Note:** This password can be changed to one of your choosing (six or more characters) once you are logged into the system
Create New Account	Navigates to a page where a new user can request an account be created
Forgot Password	Opens a window to submit a request to retrieve a user’s password
Login as Guest User	Allows a guest user to log into the system with view only privileges

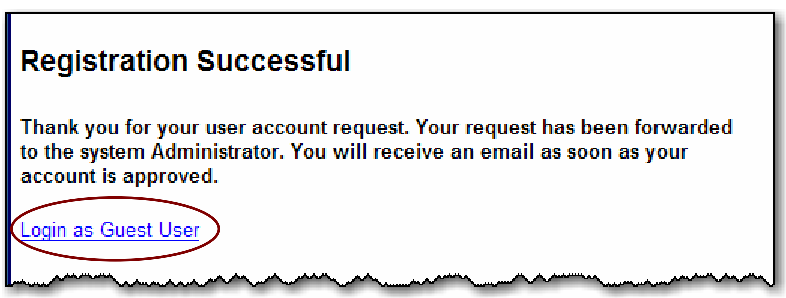
1. When the *Login* window opens, the cursor is located in the *User Name* field. Enter the user name assigned then press **Tab** to or click the mouse in the *Password* field to activate it.
2. Enter your password; click LOGIN. The main GRTS window opens.

Create New Account

If you have never logged into the system or do not account yet, you can request an account be created for you. This is accomplished via the *Login* window.

To request creation of a new account:

1. On the *Login* page, click the **Create New Account** link located below the LOGIN button. The *Terms and Conditions* page opens.
2. The *Terms and Conditions* page details the rules that must be followed by GRTS Web Application users. Read the information and if you agree check the *I Agree* checkbox, then click **Submit**. The *Request User Account* page opens.
3. Fill in the required information on the *Request User Account* page; click **Submit**. The *Registration Successful* page opens acknowledging the request for an account.
4. If you want to login immediately as a guest while waiting for your account to be created, you can click the **Login as Guest User** link on the *Registration Successful* page.

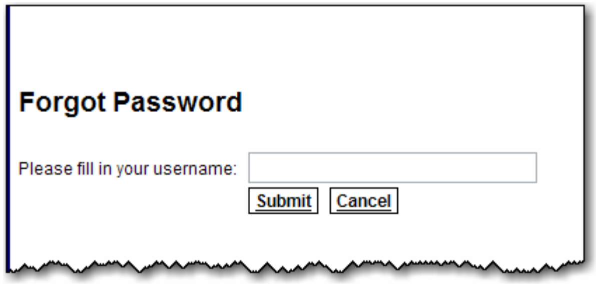


Forgot Password

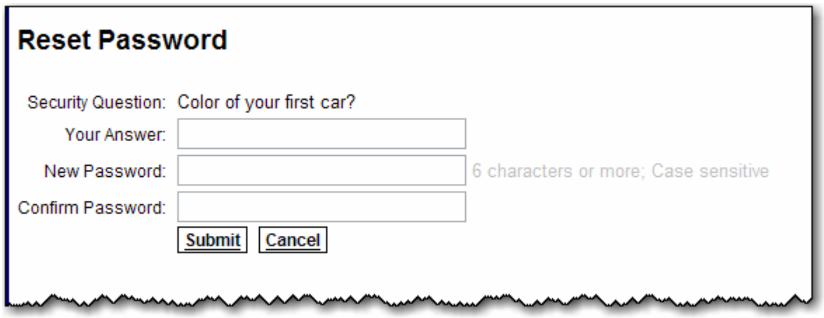
If you have forgotten your password, you can request it to be *Reset* to a new one.

To request a Password Reset:

1. Click the **Forgot Password** link on the *Login* page. The *Forgot Password* page opens.



2. Fill in your *Username* and click **Submit**. The *Reset Password* page opens.



3. Your security question will be displayed; fill in *Your Answer* to the security question; tab to the next field.
4. Enter you *New Password;* this password must be a minimum of 6 characters, is case sensitive, must begin with a letter and include at least one number (e.g., Want2see).
5. Tab to the *Confirm Password* field and retype your new password.
6. Click **Submit**. If there are any errors in the information entered, the *Reset Password* page redisplays indicating which fields contain errors. Correct the errors and click **Submit**.
7. Once the new password has been accepted GRTS Web logs you in and navigates to the opening page.

Login as Guest User

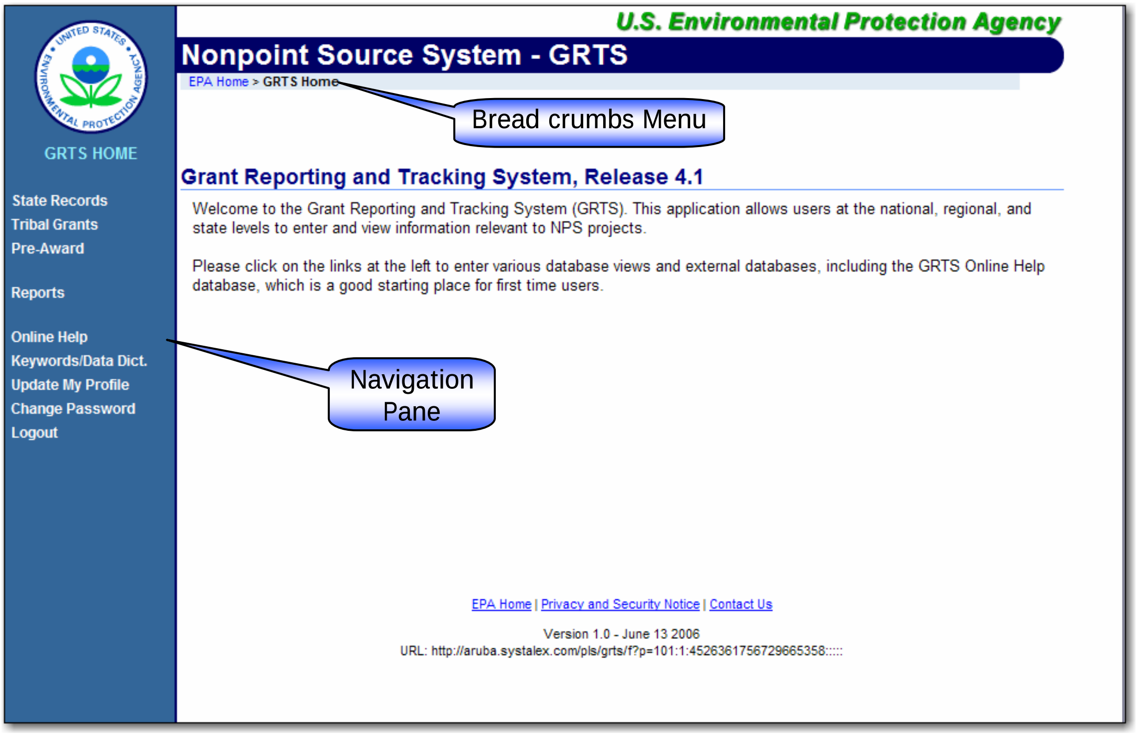
If you do not have a valid user account and want to view *Grants Project* information, you can login as a *Guest User*.

Note: *Guest Users* have View only access for *Project Records.*

To login as a *Guest User:*

1. Click the *Login as Guest User* link located below the LOGIN button on the *Login* page. The system navigates to the *Guest User Home* page.
2. Click the *Project Records* link in the left *Navigation* pane. The *Project Records* page opens in View only mode.
3. You can set filters using the fields at the top of the page to determine which projects are displayed. See the section entitled *Accessing Records* later on this manual for more information on setting filter criteria.

The GRTS Web Main Window



The GRTS window is divided into two main sections:

- ✓ *Navigation Pane* – Contains links to access various pages in the system
- ✓ Browser/Data Pane – Contains data for the accessed page

At the top left is a *Bread Crumbs* style menu allowing the user to navigate back to previous pages. This menu also shows the path through which a particular page has been accessed.

The displayed page titles indicate the navigation path; the last one on the right, displayed in black, is the page that is currently displayed.

Navigating Through the GRTS Web Application

The options for accessing different pages within the application are listed in the *Navigation Pane* displayed on the left side of the window. The options include:

Field Name / Options	Description
State Records	Navigates to the *State Records* data entry/view pages
Tribal Records	Navigates to the *Tribal Records* data entry/view pages
Pre-Award	Navigates to the *Pre-Award Records* data entry/view pages
Reports	Opens the Business Objects Reports page **

Field Name / Options	Description
Online Help	Opens the Online Help application allowing users to learn procedures for data input and review relevant to NPS projects
Keywords/Data Dictionary	Accesses a page that allows users at the national, regional, and state levels to view keywords and definitions relevant to NPS projects
Update My Profile	Opens a page for updating user profiles
Change Password	Navigates to a page where users can change their password
Logout	Log out of the GRTS Web Application

Updating User Profile

To modify your user profile:

1. Click **Update My Profile** in the left *Navigation* pane. The *Update Your Profile* window opens.
2. Enter the required information.
3. Once all information is entered, click **Submit**.
4. The updated information is stored in the database, and is effective the next time you login.

Change Password

To change your password:

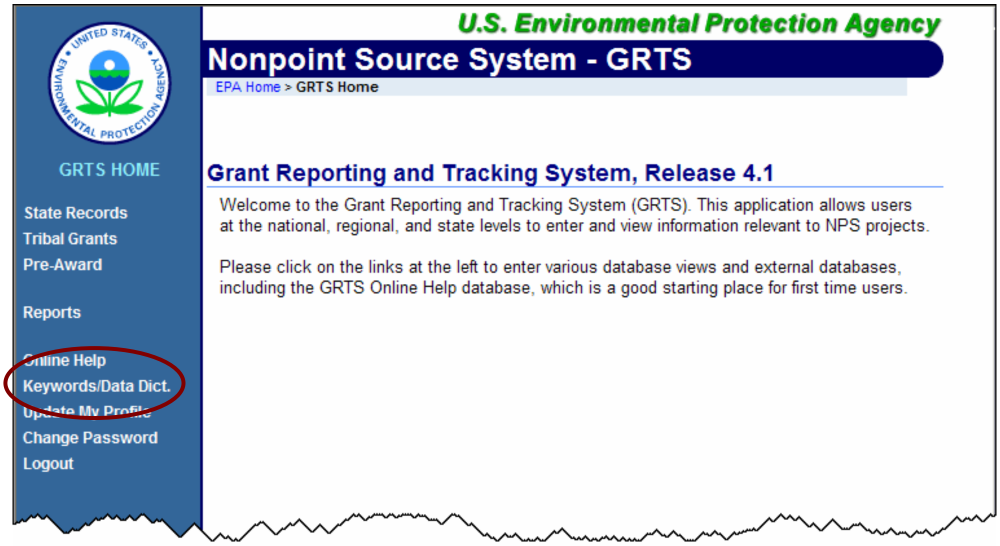
1. Click the **Change Password** link in the left *Navigation* pane. The *Reset Password* page opens.
2. See the section entitled *Forgot Password* earlier in this guide for details on changing the password.

Keywords

The Grant Tracking and Reporting System (GRTS) contains a Keywords/Data Dictionary database enabling users at the *National*, *Regional*, and *State* levels to view *Keyword* definitions that pertain to NPS projects.

To access the *Keyword* database:

1. Click **Keywords/Data Dict.** located in the left frame of the main GRTS page.



2. The GRTS Keywords and Data Dictionary welcome page opens. The left frame displays three options:

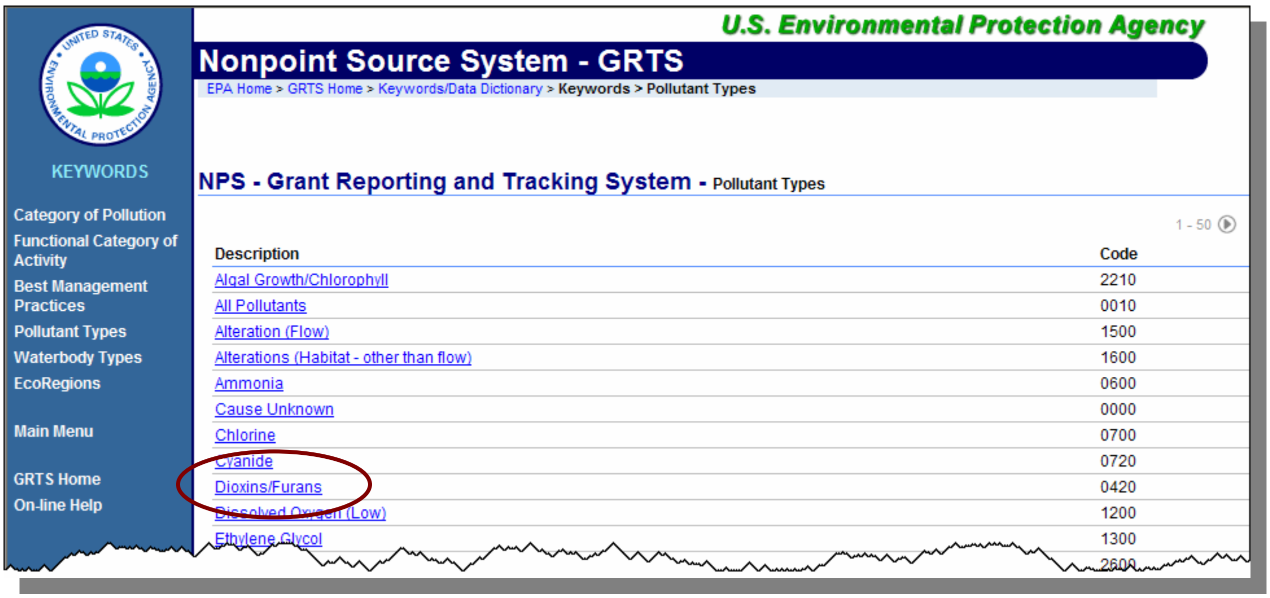
Field Name / Options	Description
Keywords	Accesses the *Keywords* database
GRTS Home	Navigates back to the GRTS *Home Page* shown above
Online Help	Access the *Online Help* for information about using GRTS Web Application

3. Click **Keywords;** the *Keywords* main page opens with the following *Keyword* options listed in the left frame:

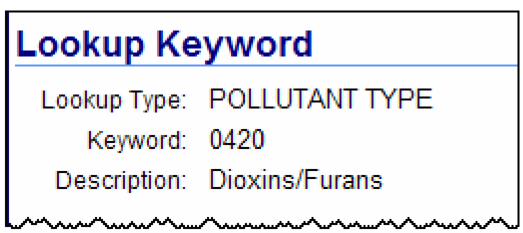
Field Name / Options	Description
Category of Pollution	A listing of numeric identification numbers for pollution categories.
Functional Category of Activity	A pick-list of *Functional Category Activities* and *Types* that can be associated with a Project. These identify the principal or main approach, remedy, or solution used to achieve the objective of a project.
Best Management Practices	A code listing of the best management practice categories of pollution control technology associated with the project. By clicking on the individual code a page opens further defining the code.
Pollutant Types	A code listing that identifies the *Pollutant* type codes used for supporting information on projects. (e.g., 0410: PCBs)
Waterbody Types	A code listing that identifies the *Waterbody* type codes used for supporting information on projects. (e.g., CM: Coastal Marine)

Field Name/Options	Description
EcoRegions	A code list identifying the Ecological (ECO) Regions related to a project. (e.g., 1500: Northern Rockies)

4. Click on a *Keyword* type in the left frame to open the individual listing pages and display the available options.
5. Click on the desired selection link to open a lookup page for the selected item. In the examples below, Dioxins/Furans was selected from the *Pollutant Types* list page which when selected opened the *Lookup Keyword* page for that option.



Keyword Listing Page



Keyword Lookup Page

6. Click the Back Button on the browser to return to the *Listing* page, or click on another *Keyword* type in the left frame to go to another category list.
7. Click *GRTS Home* on the bread crumbs menu to navigate back to the GRTS welcome page.

Accessing Pages

To access pages in the GRTS Web Application, click on the desired link in the left pane. The requested page opens.

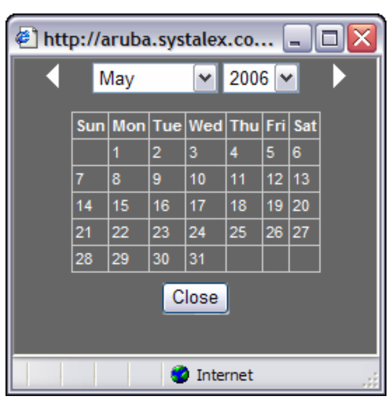
Common Functions

There are features and functions that are standard throughout the GRTS Web Application. These include:

- ✓ *Command Options*
  a. *Create New* – Opens a *Create Wizard* for the current function, e.g. *Projects*
  b. *Search* – Opens a *Search* window for entering information about a Grant or Project for which you want to search
  c. *Help* – Access online help for the current window
  d. *Logout* – Logs you out of the GRTS Web Application
  e. Save – Stores entered data
  f. Cancel – Discards any entries or modifications, closes the current page and navigates back to the previous page
  g. Press **Tab** on the keyboard to move from field to field on a form. This moves the cursor in order. If you want to enter data in a specific field, tab to it or click in a specific field with the mouse to activate it.
- ✓ *Light Grey Fields* – These fields are view only and cannot be modified
- ✓ *Activate Fields* – Clicking in a modifiable field activates it so that you can enter data
- ✓ *Enter Dates* – Dates are entered in one of two ways:

  From the Keyboard:
  a. Enter the desired date in MM/DD/YYYY format
  b. The slash between month, day and year are automatically inserted when the appropriate amount of characters is entered

  From the Calendar Icon:
  a. Click on the calendar icon next to the date field; a calendar opens



b. Using the arrows next to the *Month* and *Year* fields select the desired date. You can go forward or back a month at a time using the right and left arrows at the top next to the month and year fields.

c. Click on the desired *Day* in the calendar to select it; click **OK**

d. The calendar closes and the selected date displays in the field.

✓ *Bread Crumbs Menu* – Allows you to navigate to previous level pages within the specified grant type, e.g., Tribal, State

✓ *Selection Boxes* – Boxes next to items on a list page are used to select that item.

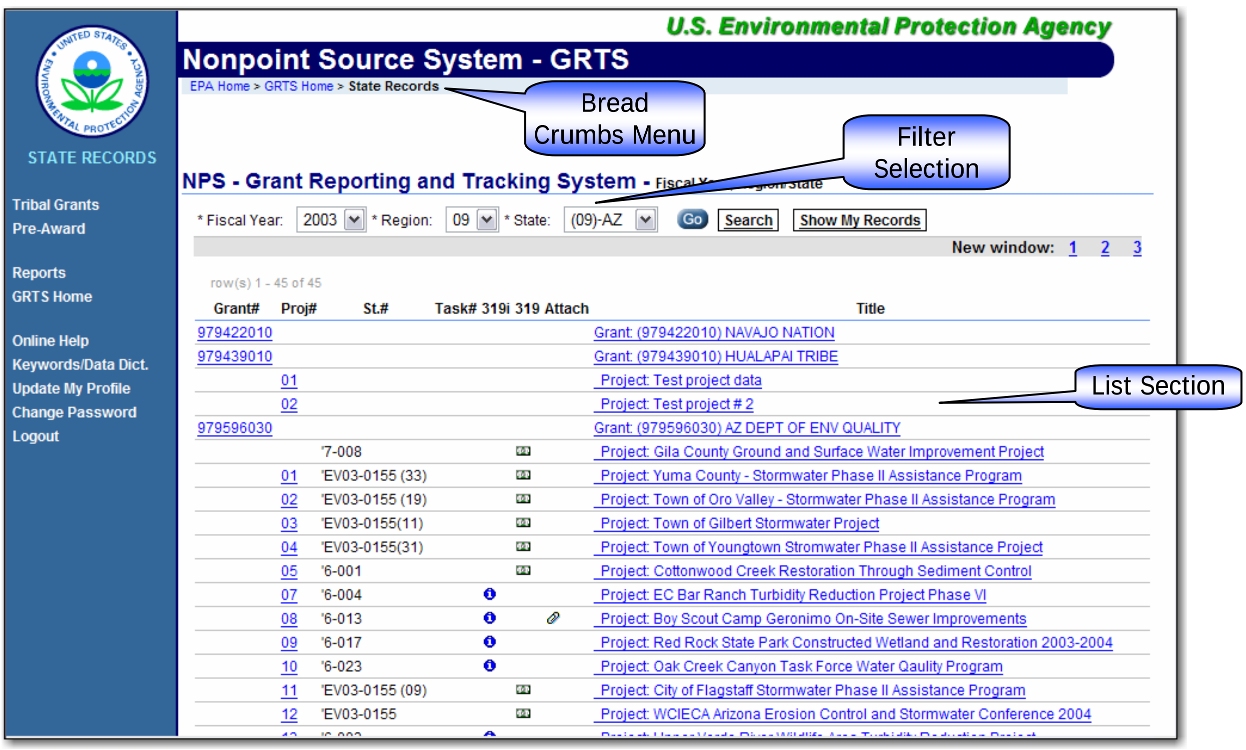
a. Click in a box to select it. You can select more than one box in a list by clicking in it

b. Select the box at the top of the column to select all items in the list

c. Click in a box that has been selected to deselect it

Accessing Records

To access *State, Tribal*, or *Pre-Award* grant information, select the type you want to access in the left pane *Navigation Menu*. A list screen opens showing the grants, projects, and tasks available for viewing and/or modification.



If there are no records displayed when this page opens that meet the default criteria, you can change the criteria using the fields at the top –

✓ *Fiscal Year* — The Fiscal Year for which you want to access *Grant* information

✓ *Region* – The *Region* for which the *Grant* was awarded

✓ *State* – The *State* in which the *Grant* was awarded

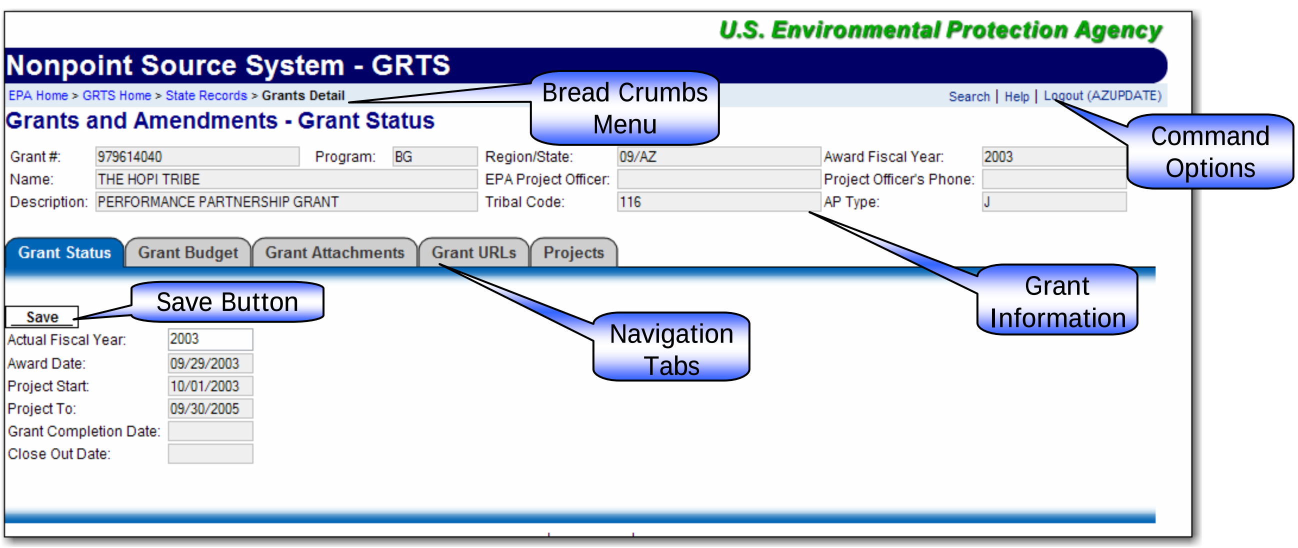
Note: You can open multiple windows displaying the same list of grants enabling you to work with more than one grant or project at a time.

Each field has an arrow next to it that when clicked on with the mouse, opens a drop-down list from which you can select. When you have finished setting the criteria the system will retrieve any records that meet the filters; if it does not automatically retrieve the records, click **Go** to activate the retrieval process.

The data displayed in the browser portion of the page are:

Field Name / Options	Description
Grant #	The number of the grants that meet the set criteria
Project #	Any projects associate with this grant
St#	The *State* project number
Task #	The task number within the project
319; 319h	Indicates the type of grant money with a dollar icon in the column
Attach	Indicates with a paperclip icon in the column whether there are attachments associated with this Project
Title	The Title of the individual grant

To access the pages associated with a specific grant or project click on the *Grant* or *Project #* or the *Title;* the *Details* page for the selected item opens.



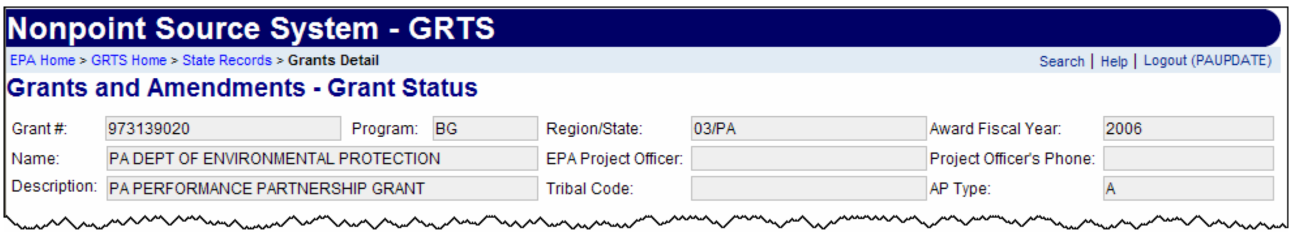
The *Details Pages* are divided into two sections:

- ✓ The top section displays identification information for the requested grant. These fields are shown in gray indicating they are view only and cannot be modified.
- ✓ The bottom section contains *Tabs* for navigating to different data areas for the requested *Grant*. The information displayed in light gray fields cannot be modified.
- ✓ Data is displayed in each tab.

Record Information

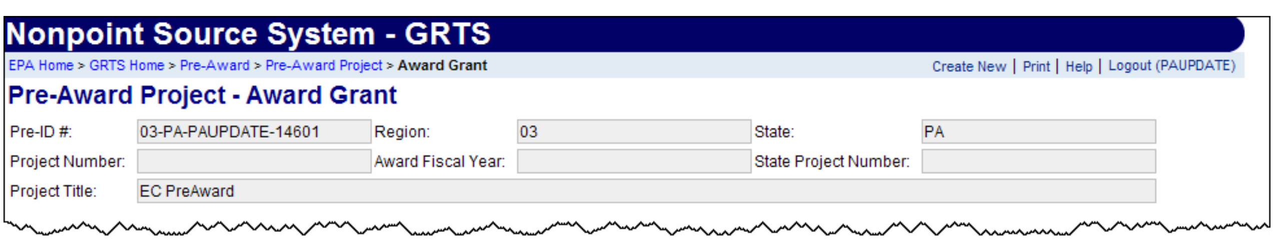
When a *Grant* or *Pre-Award* record is accessed, the top view-only section displays information pertaining to the selected grant.

Grants Information Section



Column	Description
Grant #	Value identifying the *Grant* record
Region/State	The regional and state identifiers for projects
Award Fiscal Yea	The federal fiscal year the grant was awarded
Name	Descriptive name for this *Grant*
EPA Project Officer	The name of the Project Office or other POC responsible for the Grant
Project Officer's Phone	The telephone number for the *Project Officer* assigned
Description	A descriptive narrative for this *Grant*
Tribal Code	The associated tribal code – This field is for tribal grants only
AP Type	The type of grant, which is further characterized by the Tribal Code

Pre-Award Information Section



Column	Description
Pre-ID #	The identifier assigned to a pre-award project record
Region	The regional identifier for pre-award projects that have not been assigned to a grant
State	The state identifier for pre-award projects that have not been assigned to a grant
*Project Number**	Unique Identifier for a project within the assigned grant; this number will be assigned when the grant is awarded
*Award Fiscal Year**	The federal fiscal year the grant is awarded
*State Project Number**	Identifier used by States to uniquely reference a project
Project Title	A brief narrative description of the project

* These fields are blank for Pre-Award records.

Updating Grant Data

1. Click on the tab that contains information you want to view or update; the tab displays.
2. Click in the field(s) you want to update to activate it then enter the new data.
3. Click **Save** to store your changes.

Note: You must save all data before leaving the current tab.

Common Update Functions

Many of the tabs have the same command options for entering information. The following are the basic tab and sub-tab entry options.

To Create a New List Entry*:*

1. Click New; the *Create New* page displays.
2. Enter the required information in the *Create New* page.
3. Click Save; the selection/entry is stored and you are returned to the list page. The new information is displayed in the list.

To *Delete* a List Entry:

1. Click in the square next to the listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

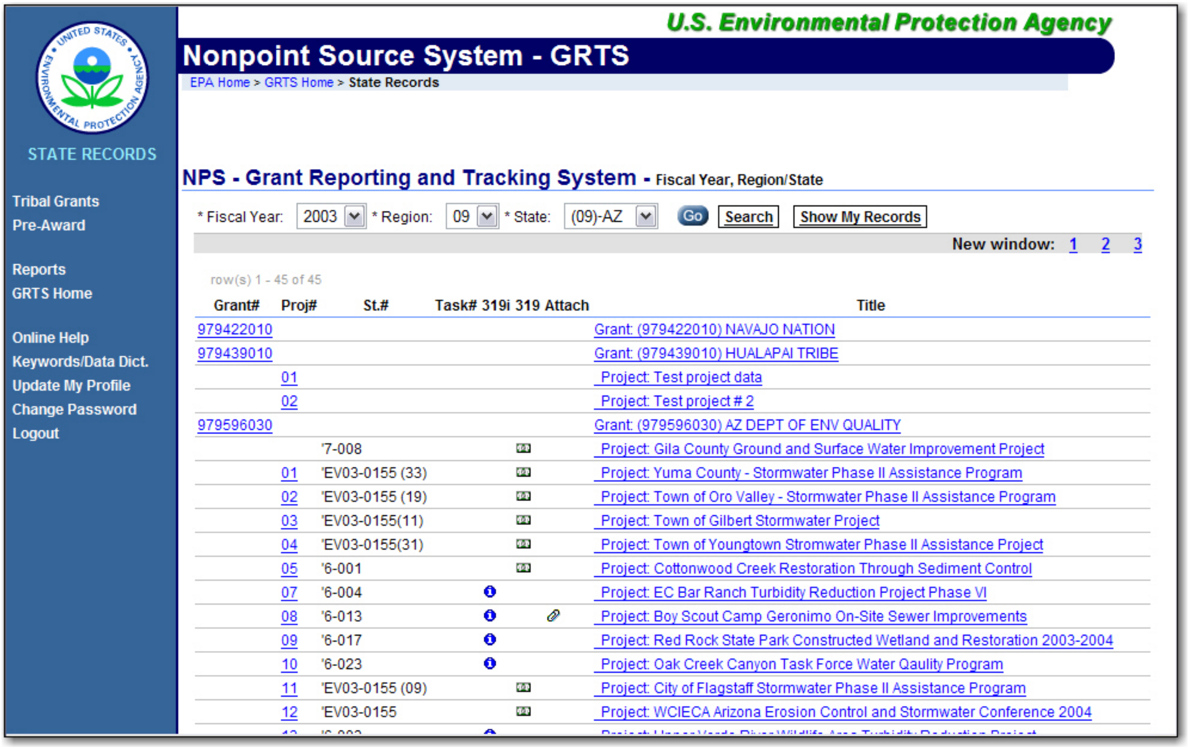
To *Edit* a List Entry*:*

1. Click [Edit] next to the listing you wish to modify; the *Edit* page displays.
2. Click the arrow next to the <*List Item*> field and select another one from the drop-down list.

3. Click Save; the selection is stored and you are returned to the list page. The modification is displayed in the list.

Working with Grants

State Grants, and the projects and tasks associated with State Grants, are accessed through the *State Grants Details Page* (see *Accessing Records* earlier in this guide).



Opening a Grant or Project

1. Set the filter criteria for locating the desired records.

   a. Click the arrow next to the *Fiscal Year* field; a drop-down list displays. Select the year for the record you want to access

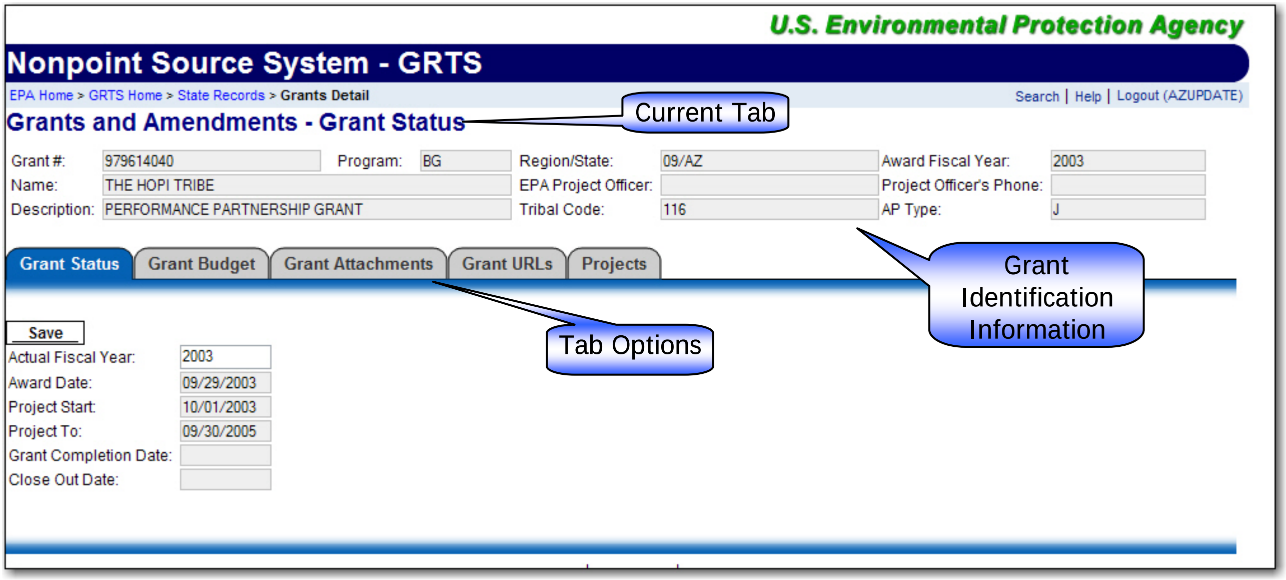
   b. Click the arrow next to the *Region* field; a drop-down list displays. Select the *Region* for the record you want to access.

   c. Click the arrow next to the *State* field; a drop-down list displays. Select the *State* for the record you want to access.

   Note: The system begins selecting records based on each filter as it is selected.

   d. If the desired list of *Grants* and *Projects* does not automatically display, click **Go** to access the desired records based on the selected criteria

2. Click on the *Grant* to be viewed and/or modified to select it; click again to open the details page with the *Grant Status* tab open. The selected *Tab* title is displayed on the top line of the *Details* page.



Grants Details Tabs and Fields

Tab/Field	Description
Grant Status Tab	**Displays information related to the Grant date parameters**
*Actual Fiscal Year**	The fiscal year for the award
Award Date	The date the *Grant* was awarded
Project Start	The date the *Project* started (is slated to start)
Project To	Completion date for the *Project*
Grant Completion Date	Date on which the *Grant* is to be completed
Close Out Date	Final close date for this *Grant*
Grant Budget Tab	**Contains information pertaining to the funds for this Grant**
Funds Awarded	The total amount of funds awarded for this *Grant*
Cum Award	The amount of funds awarded incrementally on the grant during the fiscal year
Obligated Amount	The amount of funds which a recipient legally earmarks for expenditure through orders placed, payrolls, sub-agreements awarded, travel authorizations, and other transactions
State FTEs Funded	The number of full-time equivalent state positions funded with Section 319(h) funds under this grant. (positive integer)
319(h) Dollars Awarded	The dollar amount of Section 319(h) funds awarded as either sub-grants or contracts to sub-recipients (sub-grantees or contractors) under this grant
Grant Attachment Tab	Attachments that are relevant to the selected *Grant* and/or *Project* can be added or deleted on this tab

Tab/Field	Description
Grant URLs Tab	Web accessible pages that are pertinent to his *Grant* and/or *Project* can be added or deleted via this tab
Grant Projects Tab	This tab allows *Projects* related to the selected *Grant* to be Added, Deleted, or Copied

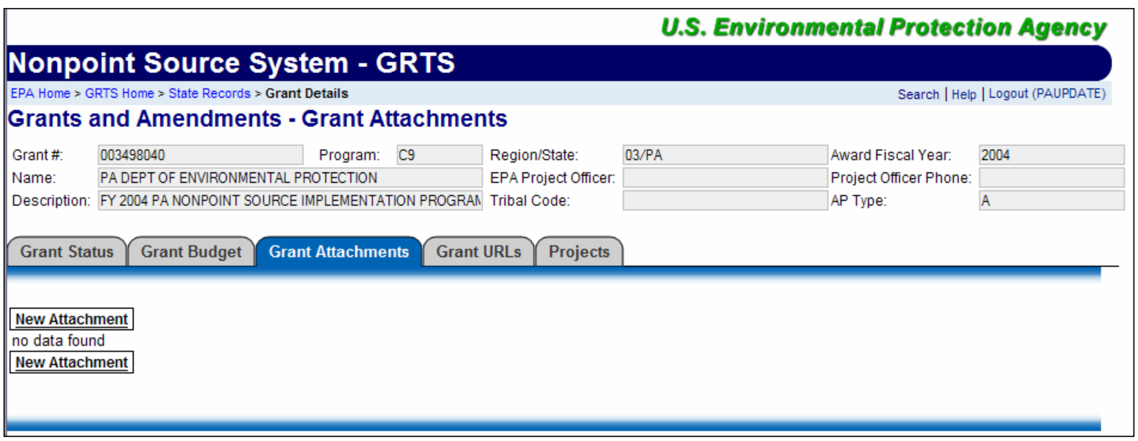
Hint: If at any time a *Details* list page is not displaying in an expected or appropriate manner, click Go to refresh the data on the page.

Adding an Attachment

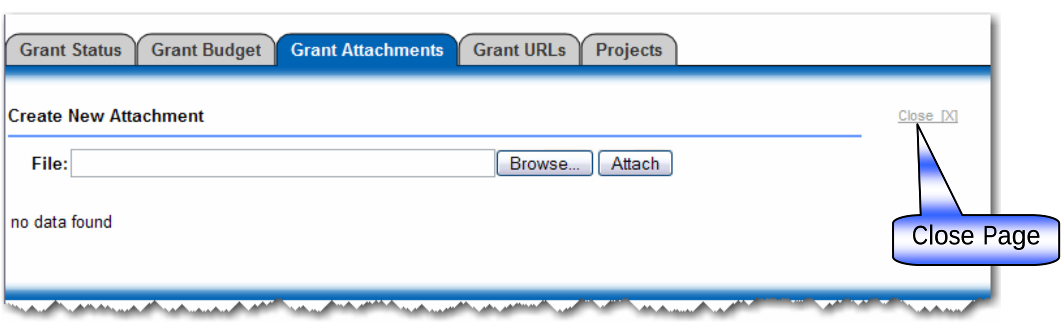
Attachments that have already been made to the selected *Grant* are displayed in the tab portion of the page. If none have been attached as yet the page displays the option to add a **New Attachment.**

To add files to the selected *Grant*:

1. Click the **Grant Attachment** tab; the *Grant Attachments* page displays.

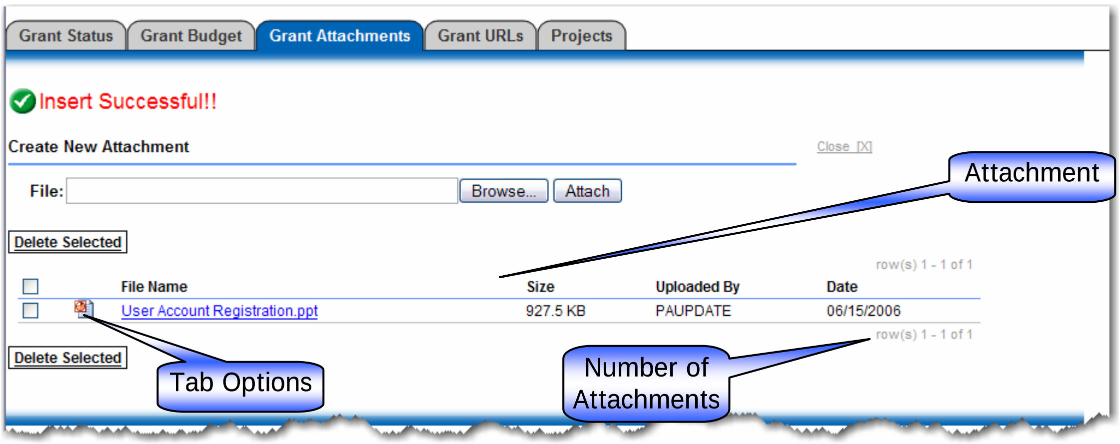


2. Click **New Attachment;** the *Create New Attachment* page displays.



3. Click **Browse** to open an explorer window displaying a file directory.
4. Navigate to the file you want to attach, click to select it then click **Open** to insert it in the *File* field.

5. Click **Attach** to attach the selected file to the *Grant*. Once the attachment is successful the *Grant Attachments* tab redisplays with the newly attached grant shown and the message *Insert Successful*.



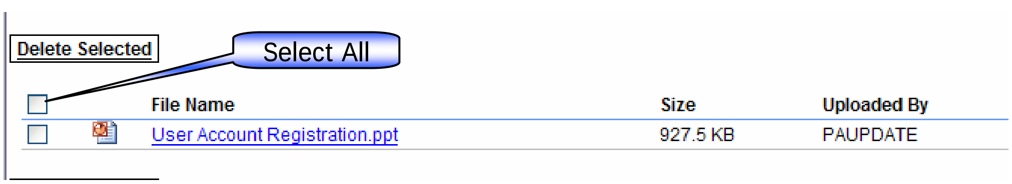
Hint: The icon to the left of the attachment name indicates the attachment file type.

6. If you change your mind about adding or deleting an attachment, click the light gray **Close [x]** located to the upper right of the *Create New Account* page.

Deleting an Attachment

To delete an attachment from a *Grant:*

1. Click the **Grant Attachments** tab to open the *Grant Attachments* page.
2. Click in the box to the left of the attachment(s) to be deleted to select; click **Delete Selected**. You can select all attachments by clicking in the box at the top of the list.



3. The selected attachment(s) is deleted and the message *Delete Successful* displays.

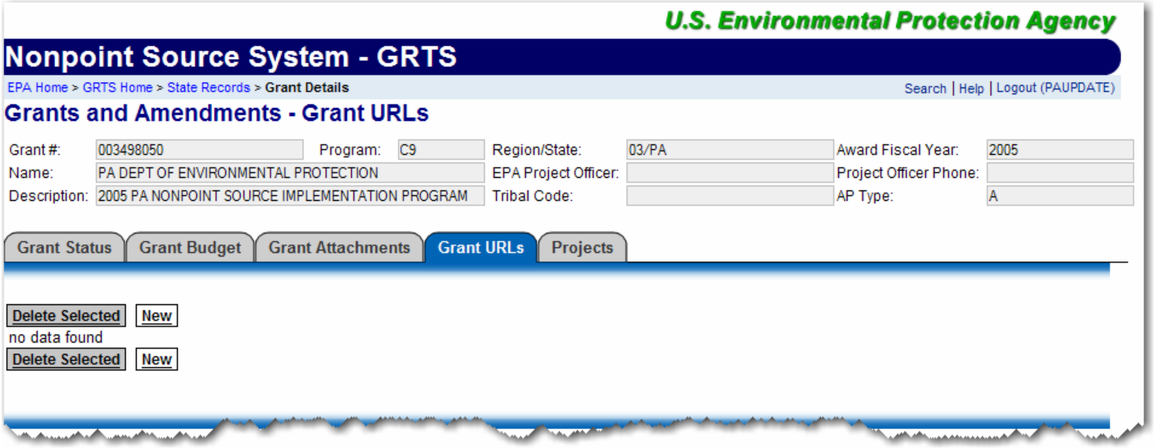
Grant URLs Tab

The system allows links to web pages to be added to *Grant* records.

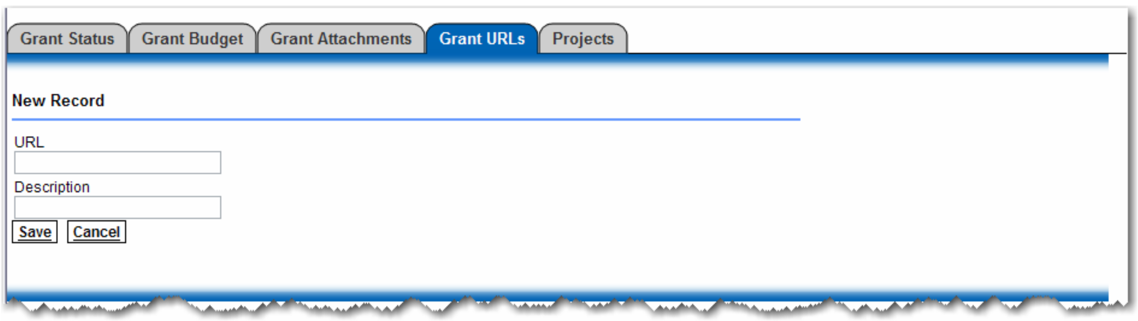
Adding Website URLs

To add URLs to a *Grant*:

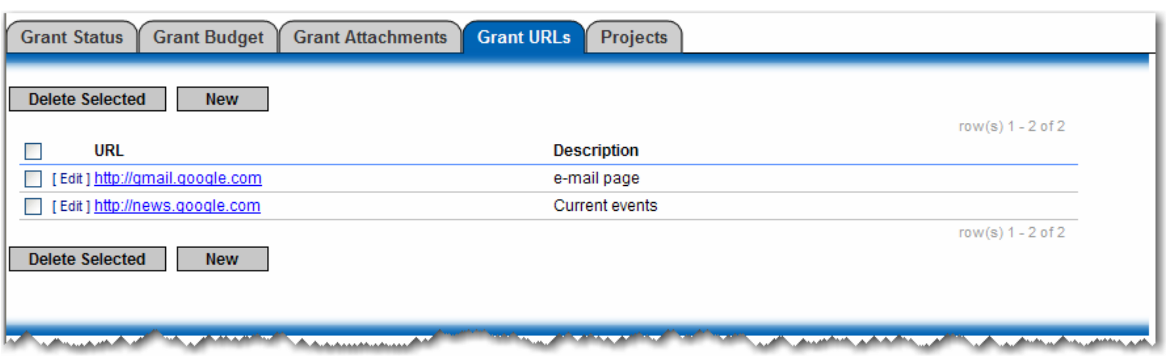
1. Click the **Grants URLs** tab; the *Grant URLs* page displays. If pages have already been associated with this *Grant* they are displayed. If none have already been associated, no data is shown.



2. Click **New**; the *New Record* page opens.



3. Enter the URL (site address) to be added to this *Grant* record.
4. Enter a *Description* for this URL, if desired.
5. Click **Save** to store the URL, and return to the *Grant URLs* list page. The added URL is displayed along with a message indicating the update/insert was successful. Click **Cancel** to discard this addition, and return to the *Grant URLs* list page.



Editing URLs

To modify a URL that has already been added:

1. Click **Edit** located next to the URL to be modified; the *Edit Record* page displays.
2. Enter the changes to be made, the click **Save**. The changes are stored and the *Grant URLs* page opens with the changes displayed, and a message indicating the update/insert was successful. Click **Cancel** to discard any modifications, and return to the *Grant URLs* list page.

Deleting URLs

To delete URLs that have been associated with this *Grant:*

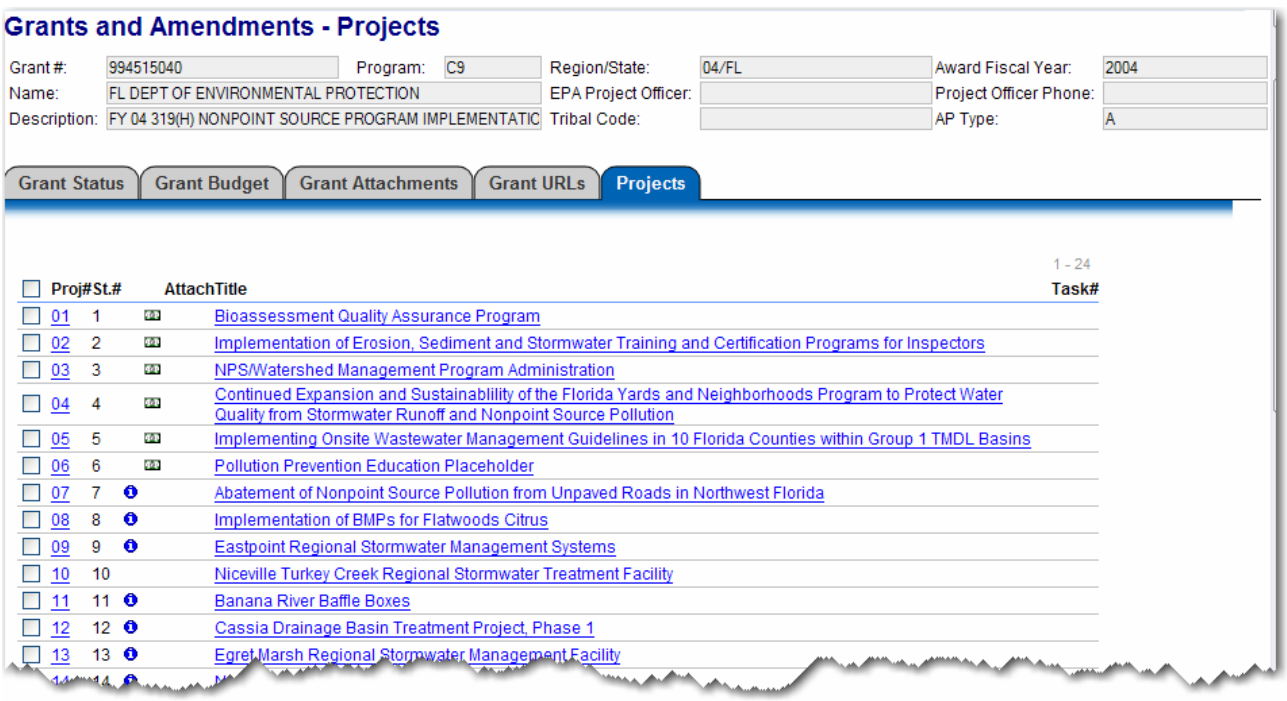
1. Click the **Grants URLs** tab; the *Grant URLs* page displays. URLs associated with this *Grant* they are displayed.
2. Click the box next to the URL(s) to be deleted to select.
3. Click **Delete Selected** to delete the desired URLs. The selected URLs are deleted, and removed from the list. A *Delete Successful* displays.

Projects Tab

The *Projects* tab is used to manage information collected for a grant. In addition to supporting information such as Drainages, Tasks, Budget and Expenditure information is collected for tracking fiscal responsibilities related to the awarded grant.

Note: Project information can be accessed by clicking on the *Projects* tab for a selected grant, or by selecting the project from the *Grants* list page.

The *Projects* tab has many sub-tabs for viewing, adding and updating information related to the selected *Grant Project.* See *Working with Projects* for more details about managing projects.



Working with Projects

You can access project details by:

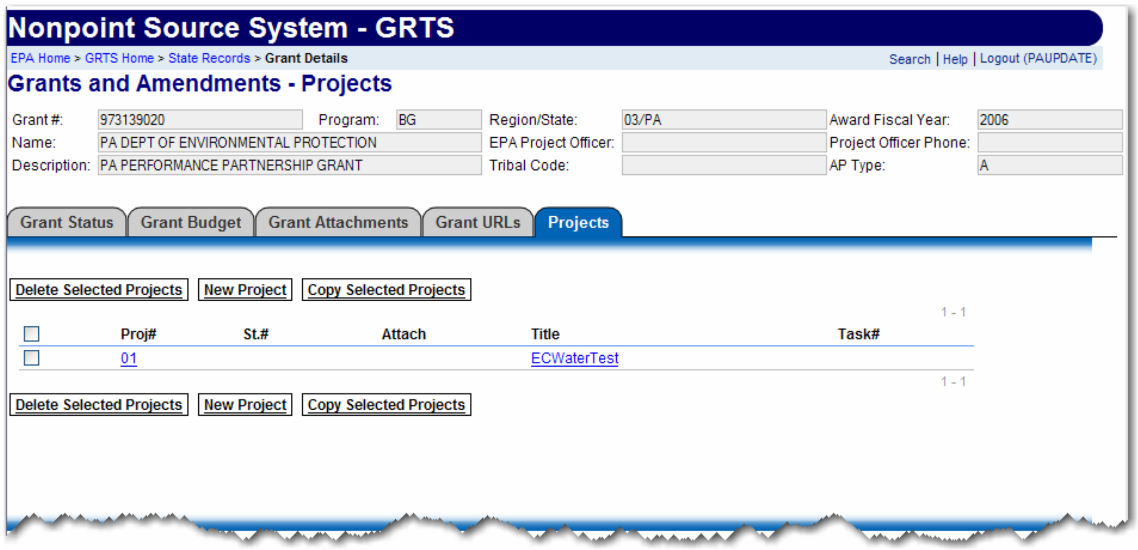
✓ Clicking on the *Projects* tab in the *Grant* information page, then selecting a *Project* associated with that *Grant*, or

✓ Selecting the desired *Project* from the *Grants Details* list page

Note: Adding, Deleting, and Copying *Projects* can only be done from the *Grants Projects* tab.

Grants Projects Tab

1. Click on the **Projects** tab; the *Grants Projects* list page displays.



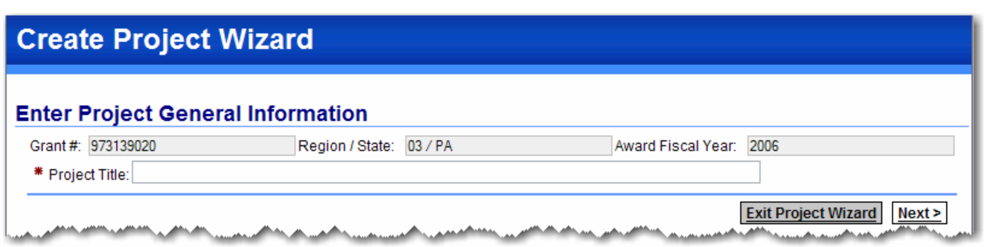
2. From the *Projects* page you can navigate to more pages containing information pertaining to a project selected from the list. You can also:
   a. Delete Selected Projects
   b. Add New Projects
   c. Copy Selected Projects

Adding a New Project

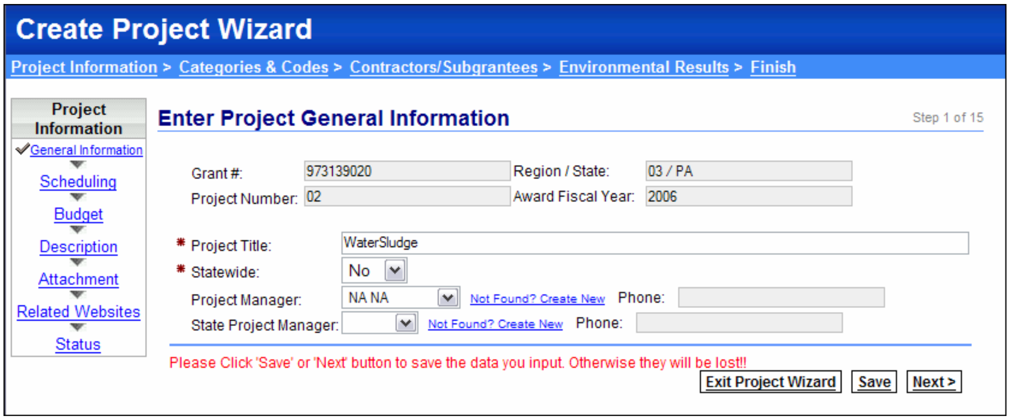
The *New Project Wizard* function is used to create projects for Current *Grants* as well as *Pre-Award* projects.

To add a new project:

1. Click **New Project;** the *Create Project Wizard* opens. This wizard guides you through the project creation process, enabling entry of all pertinent information for the new project.



2. Enter the *Project Title* for the new project then click Next >; the *Enter Project General Information* page displays.



3. Enter the required information and any of the optional information desired. Required fields are indicated with a red asterisk (*).

4. Click Save to store the entered information; this step remains open. Click Next > to proceed to the next step. If you need to return to a previous page, when available, click < Back.

Hint: When entering an attachment or URL, instead of a **save** button there will be an **Add** button for adding this attachment/URL to the *Project* data. When you click the **Add** button the data is stored and displays in the list for this step.

5. The wizard will continue to guide you through all the steps for entering information for creating a new project. When everything is entered, click **Finish;** the *Project Creation Successful* message displays.

6. There are four options available after a project has been completed:

    a. Go to Project Record to enter Optional Data Elements – this option allows you to return to the project to enter other information

    b. Create Another Project with the same Grant – Starts the *Project Wizard* again to create another *Project*

    c. Go to all Projects for this Grant – Navigates to the *Projects* tab list page

    d. Exit Project Wizard – leaves the *Project Wizard* and navigates back to the *Grants* list page

Deleting a Project

To delete a project(s):

1. On the *Projects* tab click in the box to the left of the project(s) to be deleted to select them.

2. Click **Delete Selected Projects**. You can select all projects by clicking in the box at the top of the list.

Copying a Project

To copy a project:

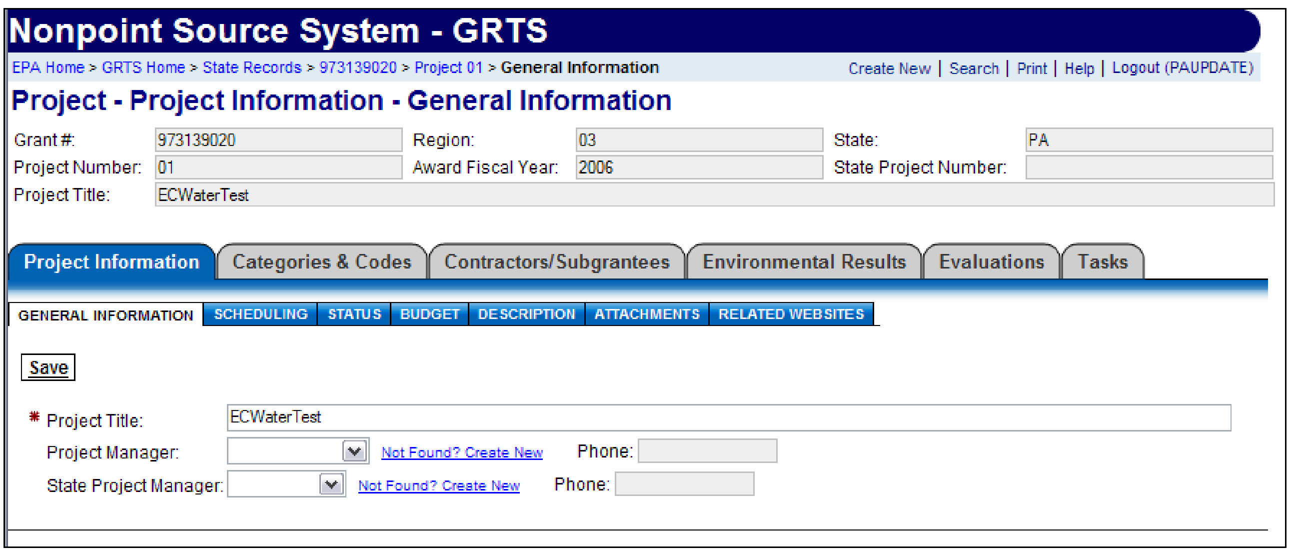
1. On the *Projects* tab click in the box to the left of the project(s) to be copied to select them.
2. Click **Copy Selected Projects**. You can select all projects by clicking in the box at the top of the list.
3. The *Copy Projects* page opens. Enter the required information and any optional information desired; click **Copy**.
4. The *Projects* list page opens with the *Copy Successful* message displayed. The new project is listed with the previously entered projects.

Project Information Page

The *Project Information* page is divided into two sections –

- ✓ The top section displays information about the selected grant and is view only
- ✓ The bottom section is divided by tabs allowing access to different sections pertinent to the selected project

Reminder: Fields with gray backgrounds are view only and cannot be updated.



Project Information Tab

The *Project Information Tab* contains seven sub-tabs:

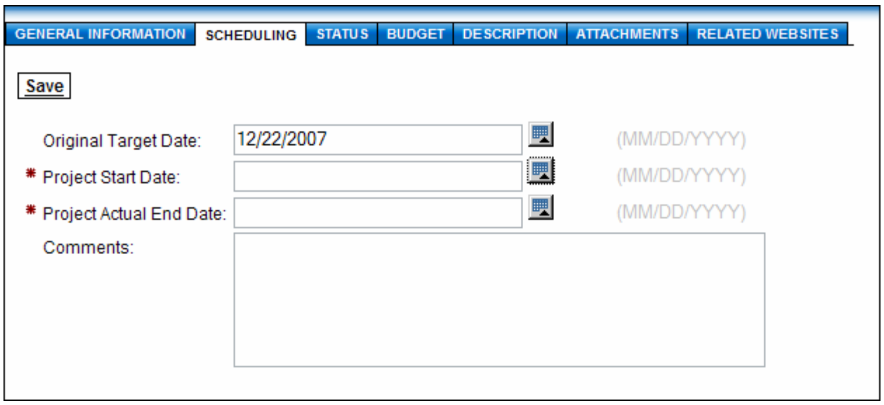
General Information Sub-tab

1. Enter a title for the new project
2. Click on the arrow next to the *Project Manager* field; select one from the drop-down list

3. Enter a *Phone Number* for the selected *Project Manager*
4. Click on the arrow next to the *State Project Manager* field; select one from the drop-down list
5. Enter a *Phone Number* for the selected *State Project Manager*
6. When you have finished entering information click **Save** before navigating to another location or your entries will be lost.

Note: If the desired *Project Manager* or *State Project Manager* is not listed, you can create a new one by clicking *Not Found? Create New* next to the field(s)

Scheduling Sub-tab



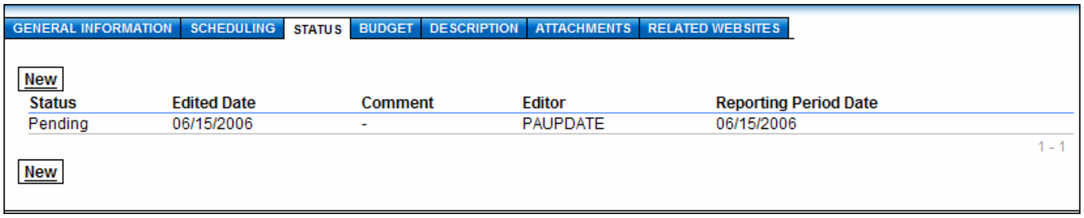
1. Enter the *Original Target Date* by keying it from your keyboard in MM/DD/YYYY format; the slash (/) is automatically inserted after the required number of characters is entered. The date can also be entered by clicking on the *Calendar Icon*  next to the date field.
2. Enter the *Project Start and Project End Dates* in the same manner.
3. Enter any comments; click **Save.**

Status Sub-tab

The *Status Sub-tab* lists any status reports that have been entered for this *Project*.

Field	Description
Status	The *Project Status* at the time this entry was made
Edited Date	The effective date of the *Status* entry
Comment	Any comments pertinent to the status entry
Editor	The user who entered the Status
Reporting Period Date	The date this *Status* was entered

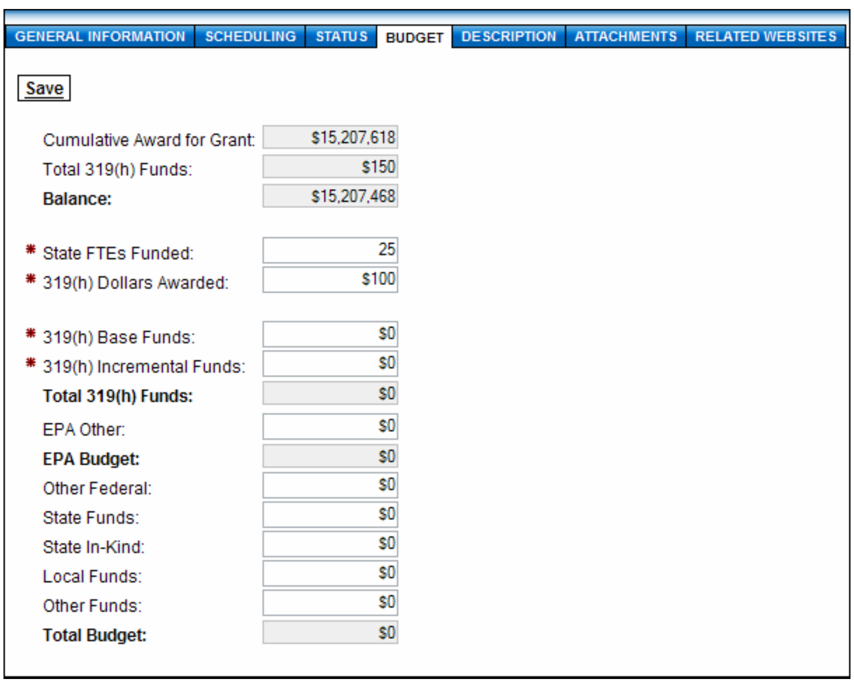
From this tab new status reports can be entered



To enter a new *Status*

1. Click New; the *Create New* window opens.
2. Click on the arrow next to the *Status* field and select the desired status from the drop-down list.
3. Tab to or click in the *Status Date* field to activate it, and enter the date for this *Status*.
4. Tab to or click in the *Comments* field and enter comments, if desired.
5. Click Save to store your entries and return to the *Status* list tab. Click Cancel to discard your entries, and return to the *Status* list tab.
6. New *Status* listing is displayed on the *Status* tab.

Budget Sub-tab



The fields in gray are *View Only*.

1. Click in the field you want to modify; enter the new amount, then tab to the next field or click in the field you want to modify next.
2. The fields with the * are mandatory fields.

Reminder: Data should be entered for the fields marked with *, however, if you do not have data to be entered for one or more of those fields at this time, the form can still be saved.

Description Sub-tab

This tab has three text fields for entering information:

- ✓ Overview – A description of the project
- ✓ Objectives – What this project is intended to accomplish
- ✓ Methods – In what way will those goals be achieved

When you have completed filling in the information click Save to store the entries.

Attachments Sub-tab

Attachments can be added or deleted from this tab. For more information on adding and deleting attachments see *Adding an Attachment* and *Deleting an Attachment* earlier in this guide.

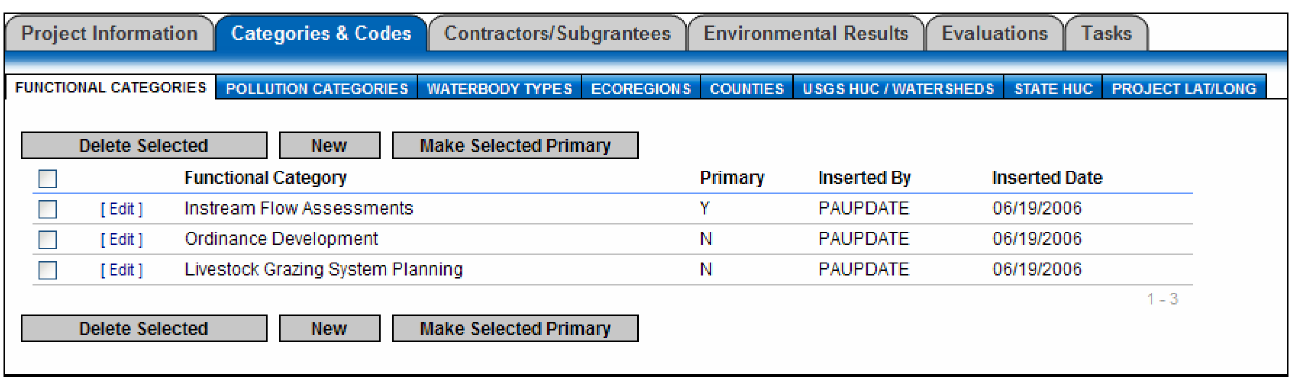
Related Websites Sub-tab

Related website addresses can be added from this tab. For more information about adding and deleting Websites, see *Adding Website URLs, Editing URLs*, and *Deleting URLs*, previously in this guide.

Categories & Codes

The functional codes categories are entered and detailed using the sub-tabs contained on the *Categories & Codes* tab. These are limited to what has been defined within the vocabulary reference table.

When you click on the *Categories &Codes* tab the page displays with the *Functional Categories* sub-tab displayed. There eight sub-tabs on this tab that are used for entering and modifying information.

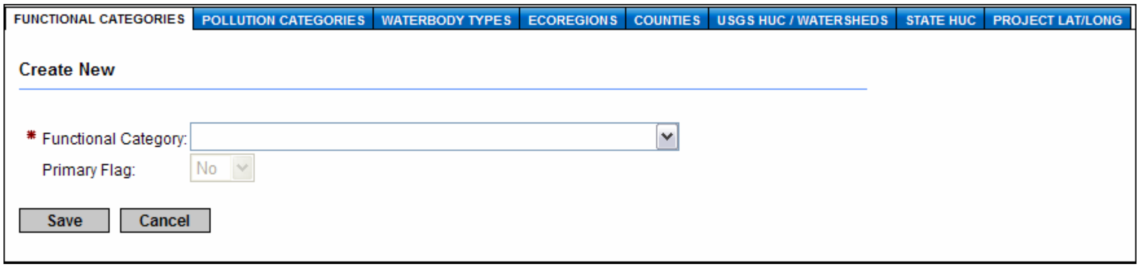


Functional Categories Sub-tab

Functional Categories identify the principal or main approach, remedy, or solution that is used to achieve the objective of the project. On this tab you can view, edit, add, and delete *Functional Categories* for this project, as well as change which category is primary.

To add a new *Functional Category:*

1. Click [New]; the *Create New* page opens.



2. Click the arrow next to the *Functional Category* field, and select a category from the drop-down list. The *Primary Flag* field is view only.
3. Click [Save]; the information is stored and you are returned to the *Functional Categories* list page. The new category is displayed in the list.

To edit a *Functional Category:*

1. Click [Edit] next to the *Functional Category* you wish to modify; the *Edit* page displays.
2. Click the arrow next to the *Functional Category* field, and select a new category from the drop-down list.
3. Click [Save]; the information is stored and you are returned to the *Functional Categories* list page. The modification is displayed in the list.

To make a *Functional Category* Primary:

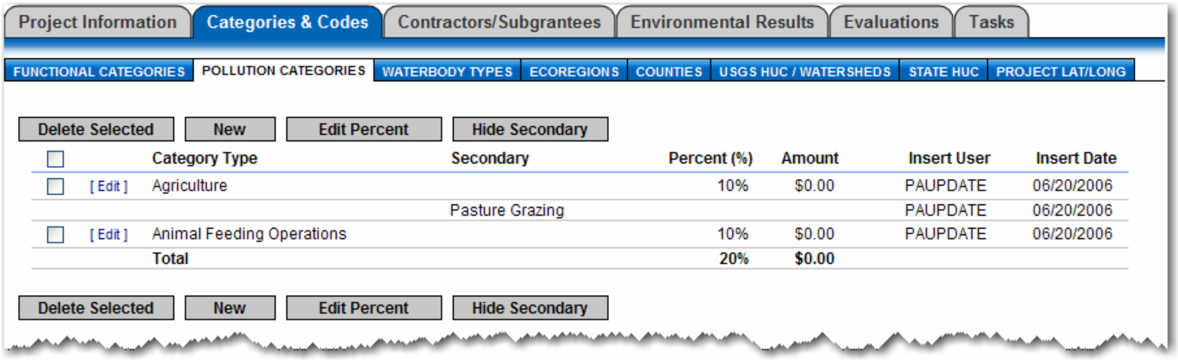
1. Click in the square next to the *Functional Category* you wish to make primary to select it.
2. Click [Make Selected Primary]; the selected category is moved to the top of the list and the *Primary* field value changes to **Y**. A message displays at the top indicating the change has been successful.

To *Delete* a *Functional Category*:

1. Click in the square next to the *Functional Category* you wish to delete to select it.
2. Click [Delete Selected]; the selected Functional Category is deleted and removed from the list.

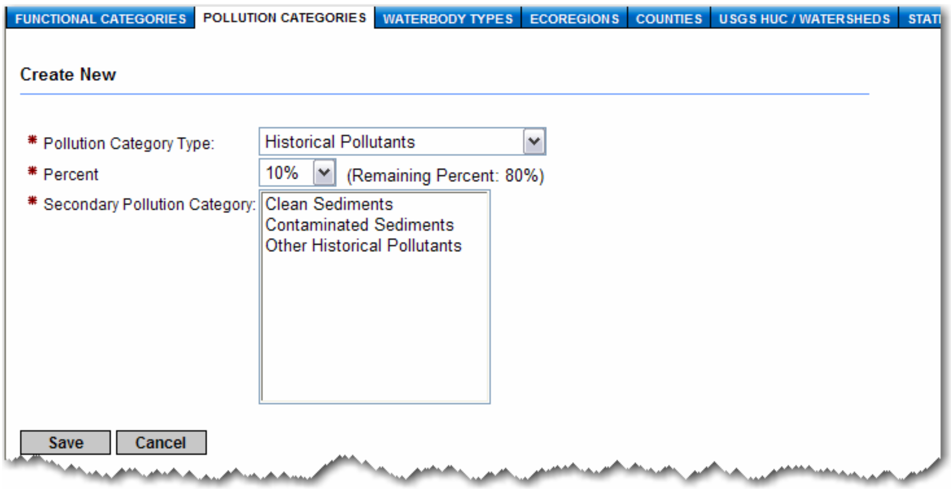
Pollution Categories Sub-tab

Pollution Categories are used to group and organize pollution types and give more supporting information for projects. Click the *Pollution Categories* sub-tab to open the page.



To add a new *Pollution Category:*

1. Click New; the *Create New* page displays.



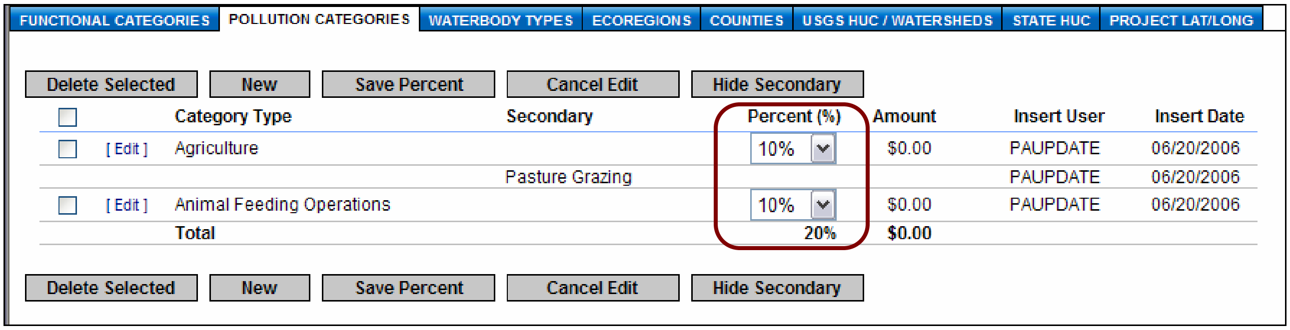
2. Click the arrow next to the *Pollution Category Type* field and select a type from the drop-down list. The *Secondary Pollution Category* list changes depending on the *Pollution Category Type* selection.

3. Click on the arrow next to the *Percent* field and select a percent for this pollution type. The percent represents the amount of pollutant versus the total amount of all pollutants found.

4. Select a *Secondary Pollution Category* from the list; click Save to store the entries and return to the *Functional Categories* page.

To Edit the Percent:

1. Click Edit Percent; the *Percent* column fields become editable with drop-down list options.



2. Click the arrow next to the percent value you want to change; a drop-down list of percent options displays.
3. Click on the desired value to select it. The list closes and the new value displays in the field.
4. Click Save Percent to save your changes and restore the fields to display only, or click Cancel Edit to undo the changes, and restore the fields.

To Delete a *Pollution Category*:

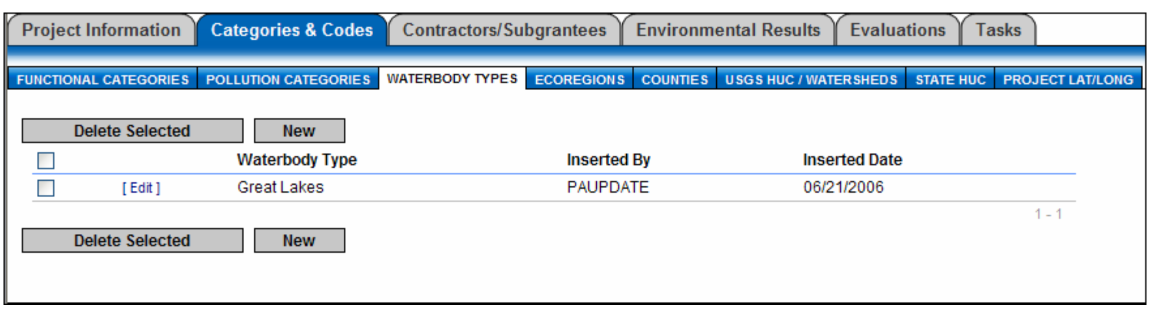
1. Click in the box next to the item you want to delete to select it.
2. Click Delete Selected; the selected item(s) is deleted and removed from the list.

To Hide/Show *Secondary Pollution Category*:

1. Click Hide Secondary; the *Secondary* column is hidden and no longer displays. The Hide Secondary changes to Show All.
2. Click Show All to display the *Secondary* column; the command button changes back to Hide Secondary.

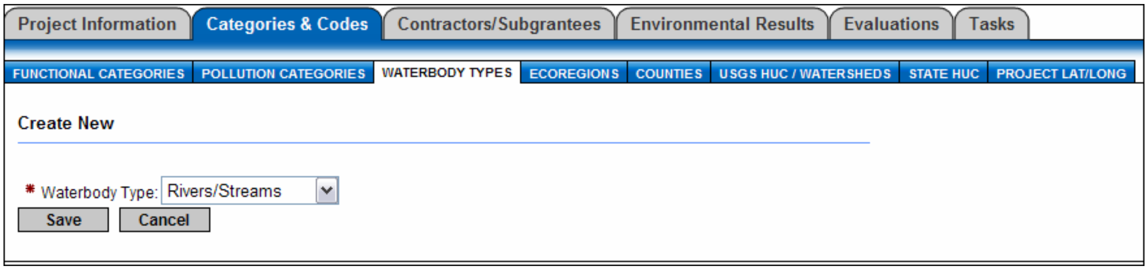
Waterbody Types Sub-tab

This tab allows you to define the water body type affected.



To enter a *New Waterbody Type:*

1. Click New; the *Create New* page displays.



2. Click the arrow next to the *Waterbody Type* field, and select a type from the drop-down list.
3. Click Save; the information is stored and you are returned to the *Waterbody Type* list page. The new type is displayed in the list. Click **Cancel** to discard any selections and return to the list page.

To *Delete* a *Waterbody Type* Entry:

1. Click in the square next to the *Waterbody Type* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

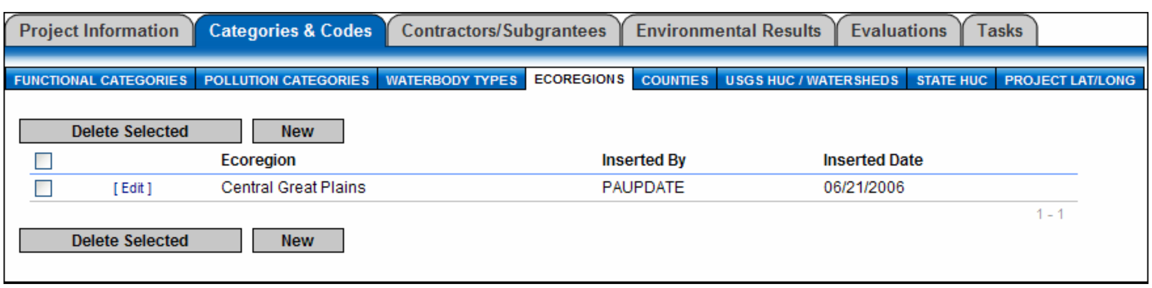
To edit a *Waterbody Type:*

1. Click [Edit] next to the *Waterbody Type* listing you wish to modify; the *Edit* page displays.
2. Click the arrow next to the *Waterbody Type* field, and select a new type from the drop-down list.
3. Click Save; the information is stored and you are returned to the *Waterbody Type* list page. The modification is displayed in the list.

State Hydrologic Unit Codes Sub-tab

This tab allows you to define the *State Hydrologic Unit Codes* for this project. *State Hydrologic Unit Codes* categorize the types of patterns in vegetation, soils, land forms, land use, and other characteristics that control or reflect spatial variations in surface water quality.

4. Click on the *State Hydrologic Unit Codes* tab to open the page.



5. Click New; the *Create New* page displays.
6. Click the arrow next to the *State Hydrologic Unit Codes* field, and select a State Hydrologic Unit Code from the drop-down list.
7. Click Save; the selection is stored and you are returned to the *State Hydrologic Unit Codes* list page. The new *State Hydrologic Unit Code* is displayed in the list.

To *Delete* a *State Hydrologic Unit Code* Entry:

3. Click in the square next to the *State Hydrologic Unit Code* listing(s) you wish to delete to select it.
4. Click [Delete Selected]; the selected listing(s) is deleted and removed from the list.

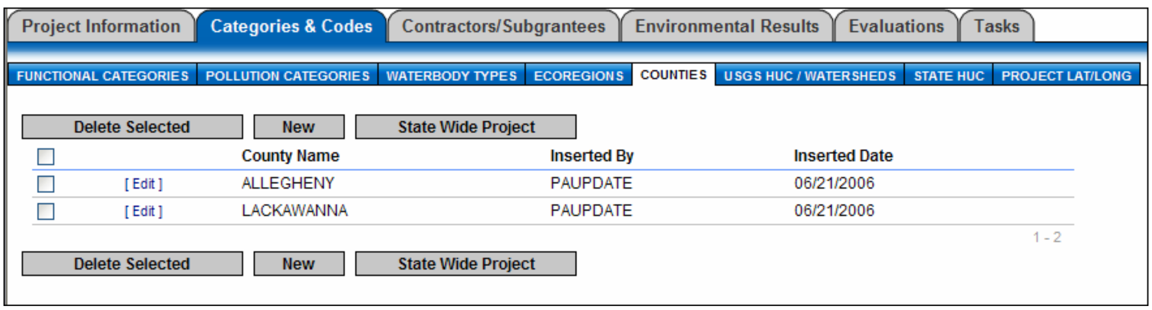
To edit a *State Hydrologic Unit Code:*

4. Click [Edit] next to the *State Hydrologic Unit Code* listing you wish to modify; the *Edit* page displays.
5. Click the arrow next to the *State Hydrologic Unit Code* field, and select a new one from the drop-down list.
6. Click [Save]; the selection is stored and you are returned to the *State Hydrologic Unit Code* list page. The modification is displayed in the list.

Counties Sub-tab

This tab allows you to set which tabs are involved with this project. You also have the ability to set this project as *Statewide*.

1. Click on the *Counties* tab to open the *Counties* page.



2. Click [New]; the *Create New* page displays.
3. Click the arrow next to the *Counties* field, and select a county from the drop-down list.
4. Click [Save]; the selection is stored and you are returned to the *Counties* list page. The new *County* is displayed in the list.

To *Delete* a *County* Entry:

1. Click in the square next to the *County* listing(s) you wish to delete to select it.
2. Click [Delete Selected]; the selected listing(s) is deleted and removed from the list.

To edit a *County:*

1. Click [Edit] next to the *County* listing you wish to modify; the *Edit* page displays.
2. Click the arrow next to the *Counties* field, and select a new one from the drop-down list.
3. Click [Save]; the selection is stored and you are returned to the *Counties* list page. The modification is displayed in the list.

To set the project to *State Wide*:

1. There can be no counties listed for a project to be *State Wide*. If there are counties listed, the must be deleted prior to changing the setting.

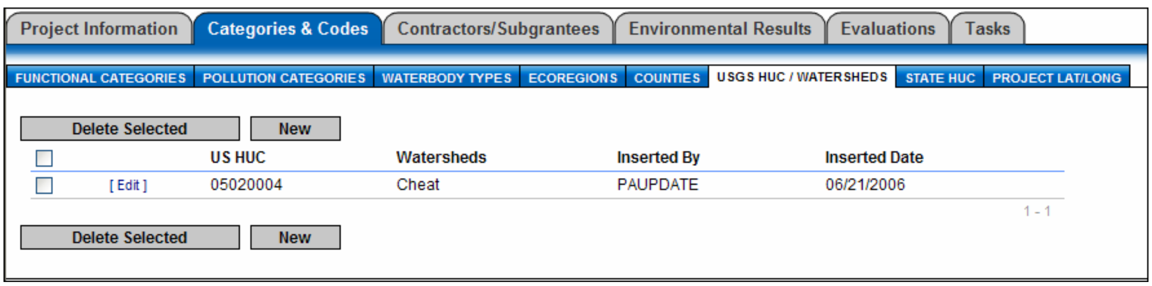
2. Click State Wide Project; the project is designated as *State Wide* in the listing, and a message displays indicating the successful setting for this project.

Hint: You have to delete the *State Wide* designation before you can designate counties for this project.

USGS HUC/ Watersheds Sub-tab

United States Geological Survey Hydrologic Unit Code and *Watersheds* are designated using this tab. USGS HUC/Watersheds do not have to be designated if a project is set to *State Wide*.

1. Click on the *USGS HUC/Watersheds* sub-tab to open the page.



2. Click New; the *Create New* page displays.
3. Click the arrow next to the *USGS HUC/Watersheds* field, and select a USGS HUC/Watershed from the drop-down list.
4. Click Save; the selection is stored and you are returned to the *USGS HUC/Watersheds* list page. The new *USGS HUC/Watershed* is displayed in the list.

To *Delete* an *USGS HUC/Watersheds* Entry:

5. Click in the square next to the *USGS HUC/Watersheds* listing(s) you wish to delete to select it.
6. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a *USGS HUC/Watersheds:*

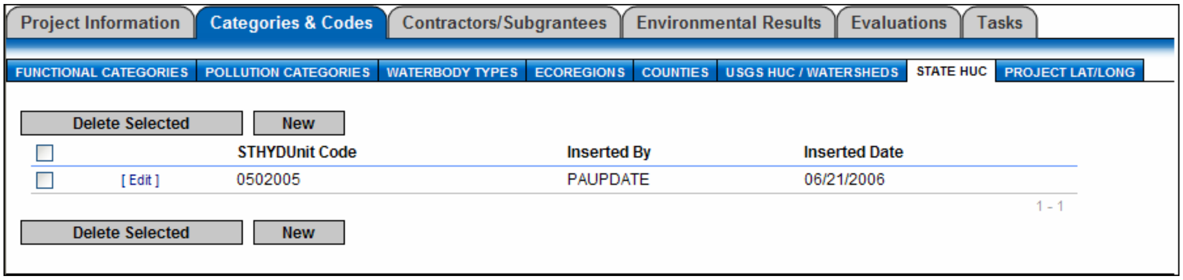
7. Click [Edit] next to the *USGS HUC/Watersheds* listing you wish to modify; the *Edit* page displays.
8. Click the arrow next to the *USGS HUC/Watersheds* field and select a new one from the drop-down list.

9. Click Save; the selection is stored and you are returned to the *USGS HUC/Watersheds* list page. The modification is displayed in the list.

State HUC Sub-tab

The *State Hydrologic Unit Code* is the designation assigned to the affected state.

1. Click the *State HUC* sub-tab; the page displays.



2. Click New; the *Create New* page displays.
3. Enter the *State Hydrologic Unit Codes* in the field.
4. Click Save; the entry is stored and you are returned to the *State Hydrologic Unit Codes* list page. The new *State Hydrologic Unit Code* is displayed in the list.

To *Delete* a *State Hydrologic Unit Code* Entry:

1. Click in the square next to the *State Hydrologic Unit Code* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

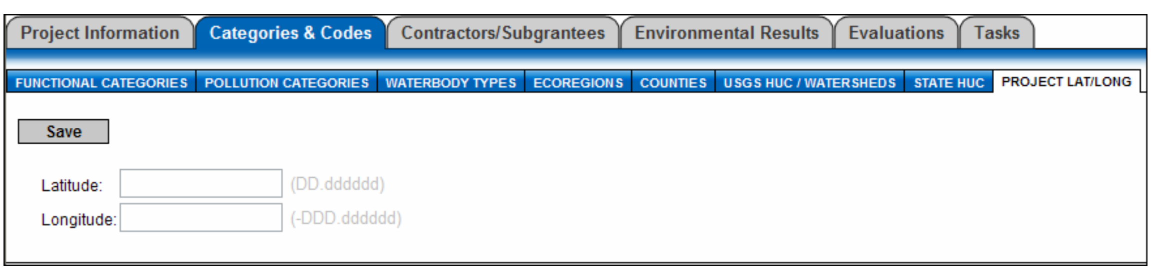
To edit a *State Hydrologic Unit Code:*

1. Click [Edit] next to the *State Hydrologic Unit Code* listing you wish to modify; the *Edit* page displays.
2. Click the arrow next to the *State Hydrologic Unit Code* field, and select a new one from the drop-down list.
3. Click Save; the selection is stored and you are returned to the *State Hydrologic Unit Code* list page. The modification is displayed in the list.

Project Lat/Long Sub-tab

This sub-tab allows you to set the latitude and longitude for the project.

1. Click on the *Project Lat/Long* sub-tab to open the page.

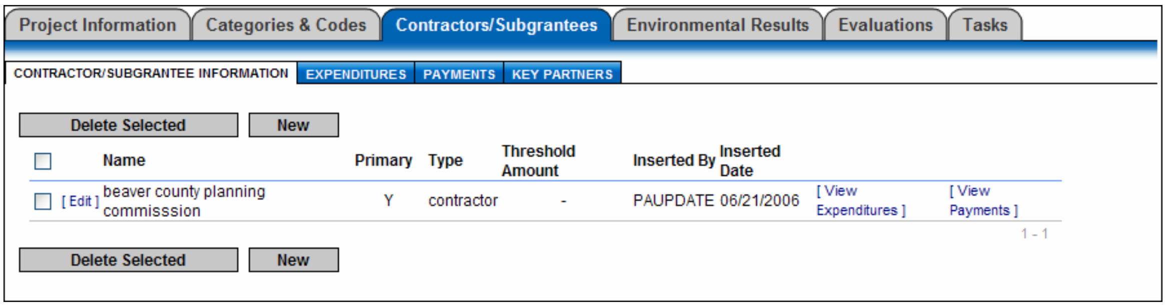


2. Click in the *Latitude* field and enter the desired value using DD.dddddd format.

3. Tab to or click in the *Longitude* field and enter the desired value using –DDD.dddddd format.
4. Click Save to store your settings. A message displays indicating the update is successful.

Contractors/Subgrantees

This tab contains sub-tabs which allow you to enter information about *Contractors* and *Subgrantees* involved in the selected project. When the tab opens the *Contractor/Subgrantee Information* sub-tab is on top.



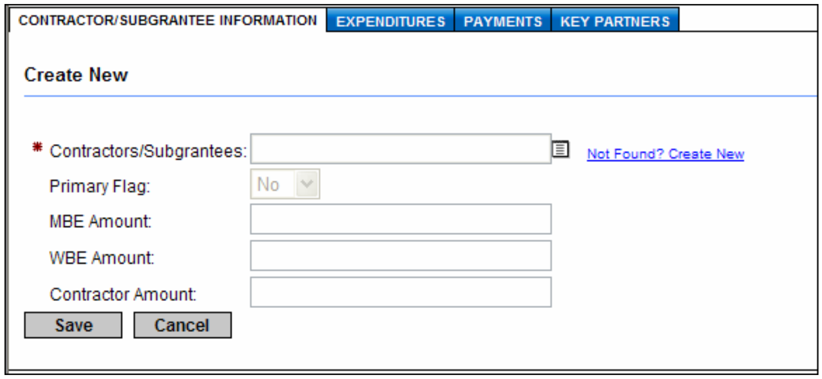
Contractor/ Subgrantee Information

The information list page displays the following fields and options:

Field	Description
Name	The name of the Contractor or Subgrantee
Primary	Flag indicating if this is the primary or sub for this project
Type	Indicates the role of this listing, i.e., *Contractor* or *Subgrantee* **Note**: This information is established at the time the *Contractor* or *Subgrantee* is entered in the system
Threshold Amount	The maximum expenditure amount established for a fiscal year
Inserted By	Indicates the user who entered this listing
Inserted Date	The date this listing was entered
[View Expenditures]	Navigates to the *Expenditures* sub-tab for viewing and updating the selected expenditure
[View Payments]	Navigates to the *Payments* sub-tab for viewing and updating the selected payment

To Enter a New *Contractor/Subgrantee*:

1. Click New; the *Create New* page displays.



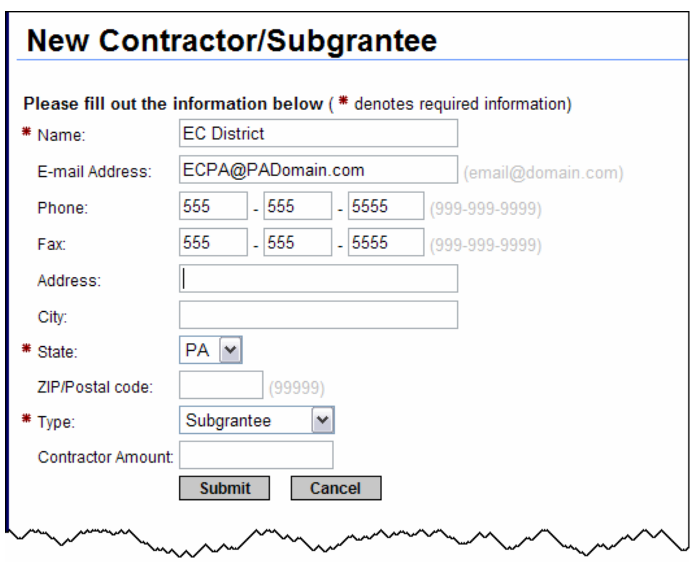
2. Click the icon next to the *Contractors/Subgrantees* field; a list box opens displaying *Contractors* and *Subgrantees* already entered in the system.
3. Select the desired *Contractors/Subgrantee;* the selection window closes after a selection is made.

Hint: You can enter a name in the *Search* field to skip to the desired listing, or you can click **Next** to navigate to other *Contractors/Subgrantee* selection pages. Click **Close** to close the selection box without choosing a *Contractor/Subgrantee.*

4. Complete the rest of the fields as needed; click Save. The *Create New* page closes and returns to the *Contractors/Subgrantees Information* page.

If the *Contractors/Subgrantee* was not found in the listing, you can create a new entry.

1. Click **Not Found? Create New** located next to the *Contractors/Subgrantees* field; the *Create Contractor/Subgrantee* page opens.



2. Enter the information; click **Submit**. The page closes and the entered *Contractors/Subgrantee* is inserted in the *Contractors/Subgrantees* field. The new *Contractors/Subgrantee* is also displayed in the listing boxes for future selection.

To *Edit* an entry:

1. Click [Edit] located to the left of the *Contractors/Subgrantee* listing; the *Edit* page opens. The fields in this page are the same as the *Create New* page.
2. Click in the fields you wish to modify and make the desired changes.
3. Click Save; the *Create New* page closes and navigates back to the *Contractors/Subgrantees Information* page.

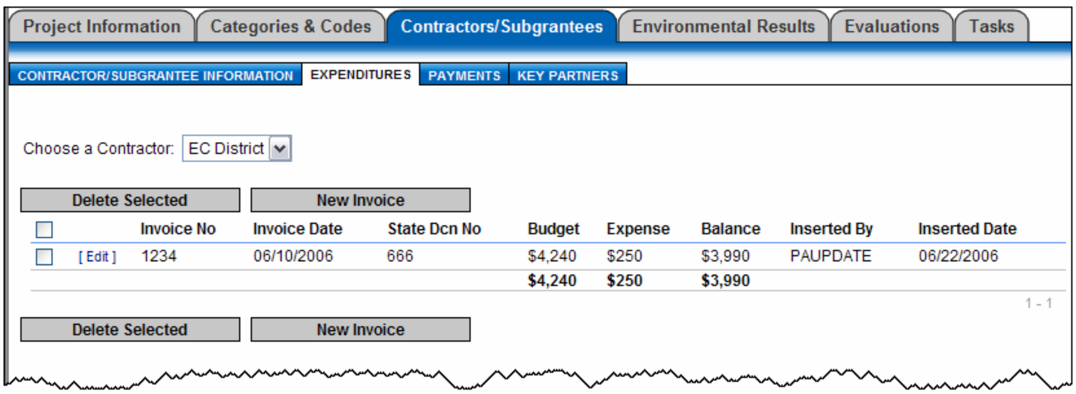
Expenditures

This tab is used to enter information about the *Contractors/Subgrantee* expenditures for this project.

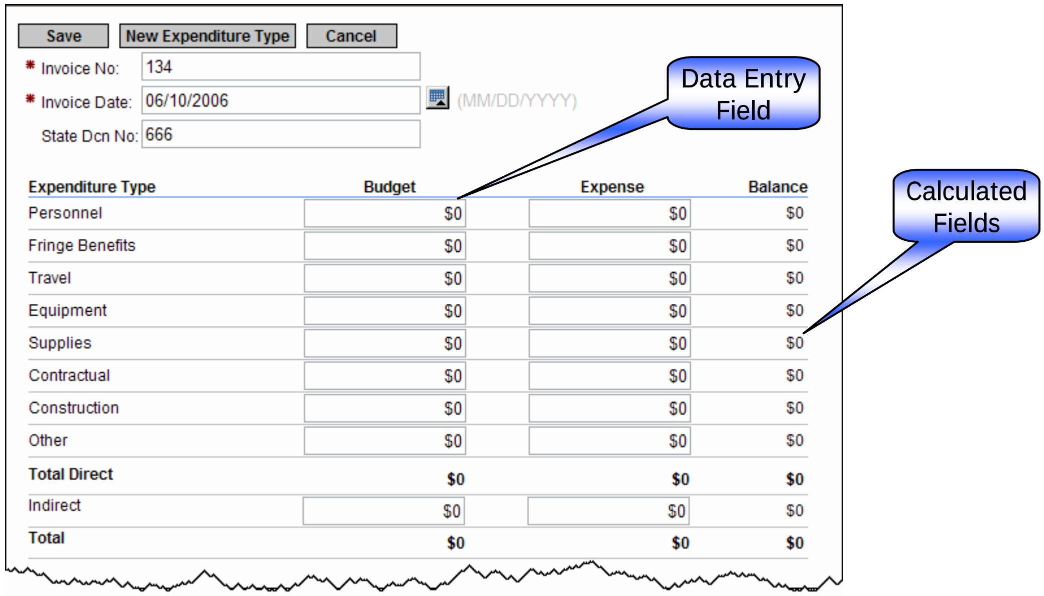
There are two ways to navigate to the expenditures page for this project:

Click the *Expenditures* tab, then select the desired *Contractors/Subgrantee* from the drop-down list, or

Click [View Expenditures] located next to the *Contractors/Subgrantee* in the list. If you use this option the *Invoice* list page displays with the *Contractors/Subgrantee* already selected.



1. Click New Invoice (if no invoices are listed the button will say **New**); a page opens allowing you to enter the *Invoice Number*, *Invoice Date*, and *State Document Control No. (DCN)* for this invoice.
2. Click Save; the page expands displaying fields for entering invoice detail. The fields within frames are enterable, those without are automatically calculated after entries are complete.



3. Click Save; the information is stored and you are returned to the *Expenditures* list page. The new *Expenditure* is displayed in the list.

To add a *New Expenditure Type*:

1. Click New Expenditure Type; the *New Expenditure Type* entry page opens.
2. Enter the information in the three fields:
   a. *Expenditure Description* – A brief description for this expenditure
   b. *Budget* – The dollar amount budgeted for this item
   c. *Expense* – The dollar amount spent for this item
3. Click Save; the *New Expenditure* page closes and you are returned to the *New Invoice* page. The *New Expenditure Type* information is added to the invoice.
4. Click Save; the *New Invoice* entry page closes and you are returned to the *Expenditures* list page.

Hint: All three fields are required. The page will not save without all information entered.

To *Delete* an *Expenditure* Entry:

1. Click in the square next to the *Expenditure* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit an *Expenditure* Listing*:*

1. Click [Edit] next to the *Expenditure* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Expenditures* list page. The changes are displayed in the list.

Payments

This tab is used to enter information about the *Contractors/Subgrantee* payments for this project.

There are two ways to navigate to the payments page for this project:

Click the *Payments* tab, then select the desired *Contractors/Subgrantee* from the drop-down list, or

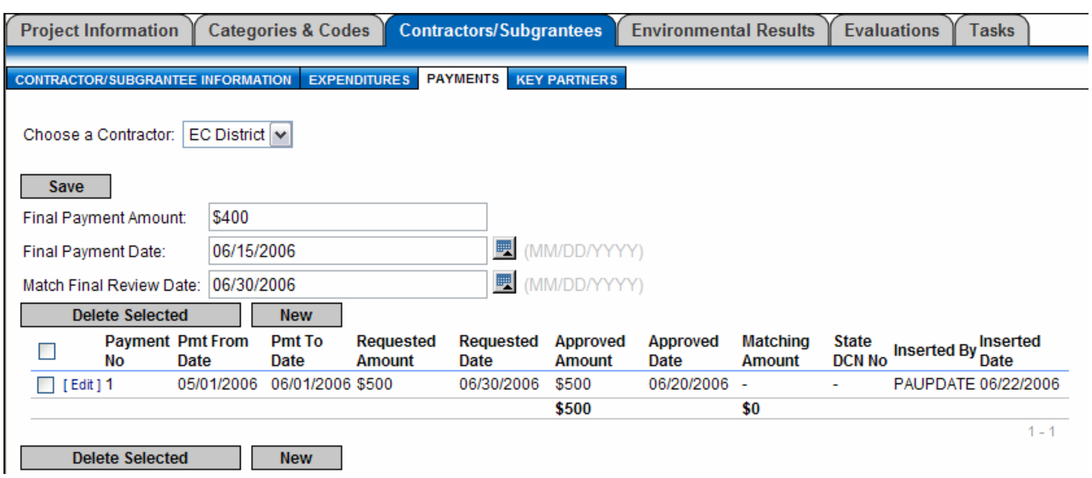
Click [View Payments] located next to the *Contractors/Subgrantee* in the list. If you use this option the *Invoice* list page displays with the *Contractors/Subgrantee* already selected.

If no payment information has been entered as yet, this tab displays a field for selecting the *Contractor/Subgrantee* whose payment information is to be entered. After selecting a *Contractor/Subgrantee*, the page displays fields for entering information pertaining to this payment.

These fields are:

- ✓ *Final Payment Amount* – The total dollar amount of final reimbursement authorized by the state NPS project officer for payment to the contractor
- ✓ *Final Payment Date* – The date of the authorization of the final reimbursement to the sub-grantee by the state NPS project officer as shown in the *Nonpoint Source Final Payment Amount* field
- ✓ *Match Final Review Date* – The date of the final review of matching dollars contributed by the sub-grantee to the project by the state NPS project officer, as shown in the *Nonpoint Source Matching Contribution Amount* field

Once this information has been entered, click **Save.** The page changes to display the entered information at the top of the *Payments* list page and the bottom of the page lists information about specific invoices that have been entered.



The columns displayed on the *Payment* list page are:

Column	Description
Payment No	The sequence number of the NPS payment for the project.

Column	Description
Pmt From Date	The starting date of the NPS payments for the project
Pmt To Date	The ending date of the NPS payments for the project
Requested Amount	The amount requested for reimbursement by the contractor from the state NPS office
Requested Date	The date of the request for reimbursement by the contractor from the state NPS office
Approved Amount	The dollar amount the state NPS project officer approves for reimbursement to the sub-grantee
Approved Date	The date the state NPS project officer approves the amount of reimbursement to the contractor, as shown in Payment Approved Amount
Matching Amount	Matching dollar amount contributed by the contractor for the period between payment start date and payment end date
State DCN Number	State Document Control Number that identifies a payment request or payment submitted by contractor for work performed for a project
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter an invoice:

1. Click [New]; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this invoice.
3. Click [Save]; the *Create New* page closes and returns you to the *Payments* list page. The new invoice displays in the list and the message indicating the update was successful displays on top.

To *Delete* a *Payment* entry:

1. Click in the square next to the *Payments* listing(s) you wish to delete to select it.
2. Click [Delete Selected]; the selected listing(s) is deleted and removed from the list.

To edit a *Payment* listing*:*

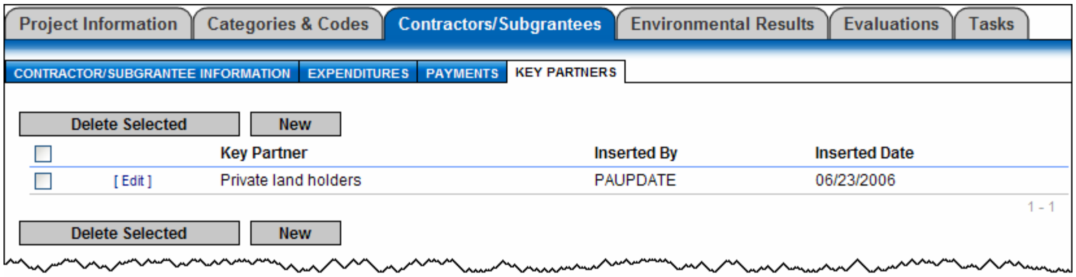
1. Click [Edit] next to the *Payment* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click [Save]; the information is stored and you are returned to the *Payments* list page. The changes are displayed in the list.

Key Partners

This tab is for entering *Key Partners* involved in this project. There are four options defined:

- ✓ County/Municipal Agencies
- ✓ Other Federal Agencies

- ✓ Other State Agencies
- ✓ Private Land Holders



To enter a *Key Partner*:

1. Click New; the *Create New* page opens.
2. Click the arrow next to the *Key Partner* field, then select from the drop-down list. The selected value displays in the field
3. Click Save; the *Create New* page closes and returns you to the *Key Partner* list page. The new *Key Partner* displays in the list and the message indicating the update was successful displays on top.

To *Delete* a *Payment* entry:

1. Click in the square next to the *Key Partner* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a *Payment* listing*:*

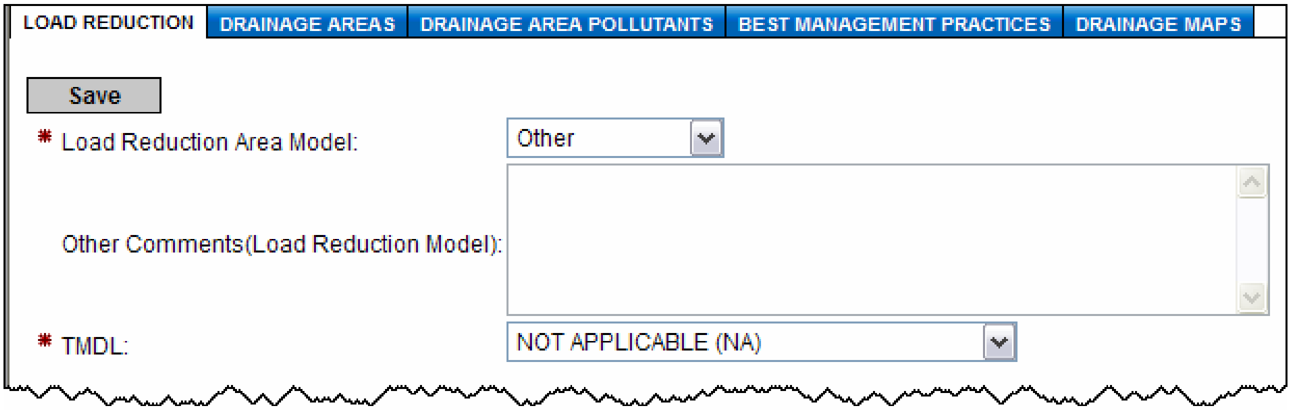
1. Click [Edit] next to the *Key Partner* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Key Partner* list page. The changes are displayed in the list.

Environmental Results Tab

This tab is used to identify and enter information related to the environmental results that occurred as result of implementation of this project.

Load Reduction

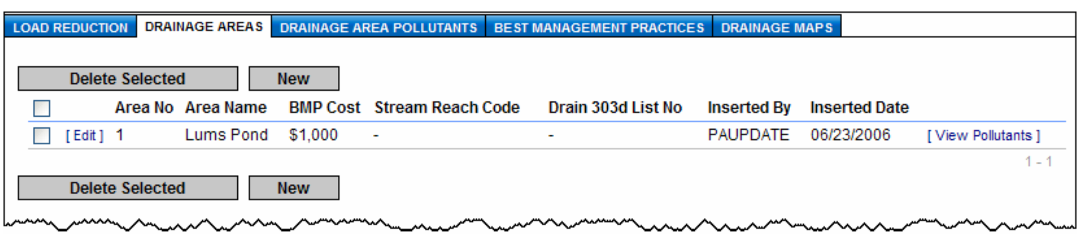
Click on the *Load Reduction* tab to enter information related to *Load Reduction Area Models* that can be used with Projects.



1. Click on the arrow next to the *Load Reduction Area Model* field, and select one from the drop-down list.
2. Enter comments for this model; this is an optional field.
3. Click on the arrow next to the *TMDL* (*Total Maximum Daily Load*) field, and select from the drop-down list. The TMDL field identifies the relationship of the project's funding to TMDL activities. The options are:
   a. Developing a TMDL(s)
   b. Developing a TMDL implementation plan(s)
   c. Implementing a TMDL
   d. Not Applicable (N/A)
4. Click Save; the information is stored and a message displays indicating the update was successful.

Drainage Areas

Click on the *Drainage Areas* tab to enter data for drainage areas related to a project, including supporting information about the drainage such as pollutant information.



The columns displayed are:

Column	Description
Area No	A unique drainage area number for the project; it is a system generated value within a project resulting in a unique list of drainage numbers
Area Name	The name (if any) of the particular drainage area that will be impacted by the implementation of the BMPs associated with the project
BMP Cost	The cost of implementing the *Best Management Practice*
Stream Reach Code	A 14-digit code that identifies the particular stream reach impacted by the BMPs funded under the project
Drain 303d list No	Reference number listed in the section 303(d) of the *Clean Water Act* for evaluating Drainage Areas
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter a new *Drainage Area*:

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this invoice.
3. Click Save; the *Create New* page closes and returns you to the *Drainage Area* list page. The new *Drainage Area* displays in the list and a message indicating the update was successful displays on top.

To *Delete* a *Drainage Area*:

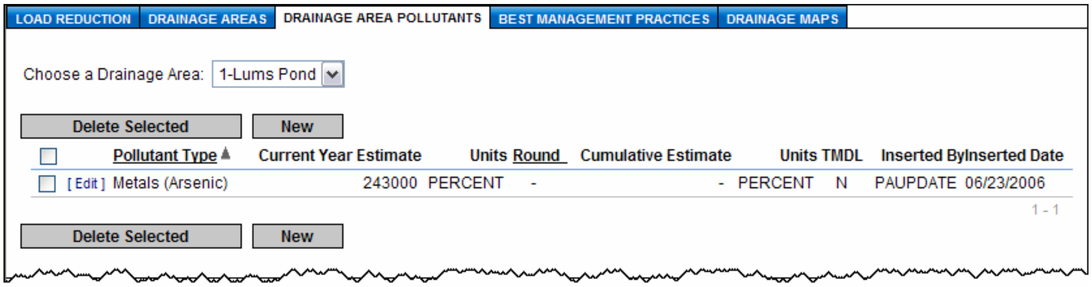
1. Click in the square next to the *Drainage Areas* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a *Drainage Area* listing*:*

1. Click [Edit] next to the *Drainage Areas* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Drainage Area* list page. The changes are displayed in the list.

Drainage Area Pollutants

Click on the *Drainage Areas* tab to enter data for identifying pollutants related to a *Drainage Area*. The Pollutant units of measure and estimates among other values, including supporting data are entered using this tab.



Column	Description
Pollutant Type	A selection indicating the type of pollutant addressed in this drainage area
Current Year Estimate	Estimate values for the pollutant on the current year
Units	Units in which the *Current Year Estimate* are expressed, e.g. percent
Round	Best Management Practice Implementation Round
Cumulative Estimate	The cumulative value for the particular pollutant over the years
Units	Units in which the *Cumulative Estimates* are expressed, e.g. percent
TMDL	Value indicating whether the *Total Maximum Daily Load* (TMDL) plan meets the water quality standards based on Section 303(d) of the *Clean Water Act*
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter a *Drainage Area Pollutant*:

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this Drainage Area Pollutant.
3. Click Save; the *Create New* page closes and returns you to the *Drainage Area Pollutant* list page. The new *Drainage Area Pollutant* displays in the list and a message indicating the update was successful displays on top.

To *Delete* a *Drainage Area Pollutant*:

1. Click in the square next to the *Drainage Area Pollutant* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

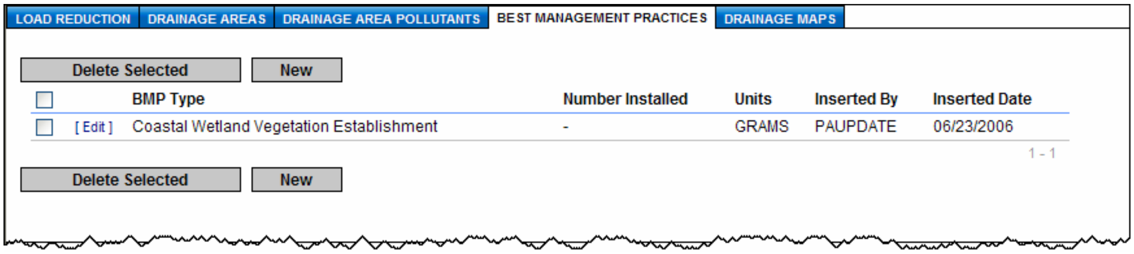
To edit a *Drainage Area Pollutant* listing:

1. Click [Edit] next to the *Drainage Area Pollutant* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.

3. Click Save; the information is stored and you are returned to the *Drainage Area Pollutant* list page. The changes are displayed in the list.

Best Management Practices

Click on the *Best Management Practices* tab to enter information for relating Best Management Practices (BMP) to projects. The BMP values used are predefined.



Column	Description
BMP Type	A type title indicating the *Best Management Practice* category of pollution control technology associated with the project
Number Installed	The numerical value that quantifies the particular BMP
Units	Units in which the *Number Installed* are expressed, e.g. grams
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter a *Best Management Practice* (BMO):

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this BMP.
3. Click Save; the *Create New* page closes and returns you to the *Best Management Practices* list page. The new *BMP* displays in the list and a message indicating the update was successful displays on top.

To *Delete* a *BMP*:

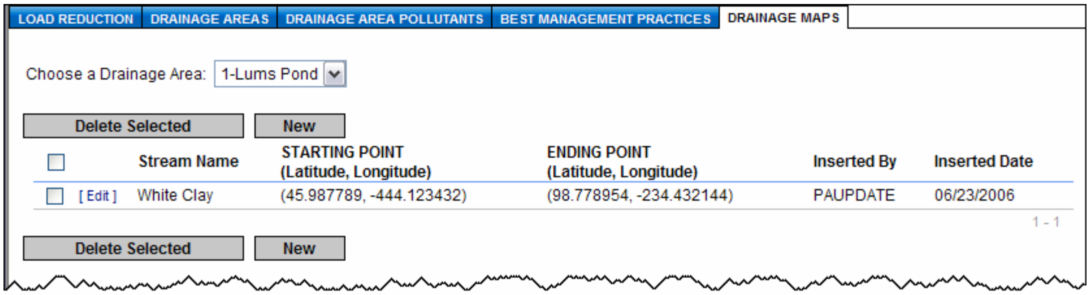
1. Click in the square next to the *BMP* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a *BMP* listing*:*

1. Click [Edit] next to the *BMP* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Best Management Practices* list page. The changes are displayed in the list.

Drainage Maps

Click on the *Drainage Maps* tab to define the longitudes and latitudes that will be covered by the body of water impacted by this project.



Column	Description
Stream Name	The name of the body of water defined by these values
Starting Point	The latitude/longitude that identify the drainage area starting point.
Ending Point	The latitude/longitude that identify the drainage area location or ending point.
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter a *Drainage Map*:

1. Click on the arrow next to the *Choose a Drainage Area* field and select an area from the drop-down list. The page displays the selected area and a list section.
2. Click New; the *Create New* page opens.
3. Enter the *Start Point* and *End Point* Longitude and Latitude for this *Drainage Map*
4. Click Save; the *Create New* page closes and returns you to the *Drainage Area* list page. The new *Drainage Area* displays in the list and a message indicating the update was successful displays on top.

To Delete a Drainage Map:

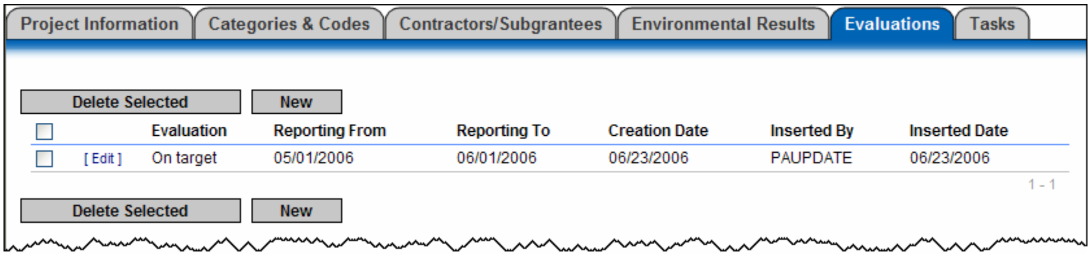
1. Click in the square next to the *Drainage Map* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a Drainage Map:

1. Click [Edit] next to the *Drainage Map* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Drainage Map* list page. The changes are displayed in the list.

Evaluations

Click on this tab to open a page for identifying evaluations and supporting data for the project.



Column	Description
Evaluation	Description of the evaluation
Reporting From	Starting date of the evaluation period
Reporting To	Ending date of the evaluation period
Creation Date	Calendar Date the project evaluation was created
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter an *Evaluation*:

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this *Evaluation*.
3. Click Save; the *Create New* page closes and returns you to the *Evaluation* list page. The new *Evaluation* displays in the list and a message indicating the update was successful displays on top.

To Delete an *Evaluation*:

1. Click in the square next to the *Evaluations* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

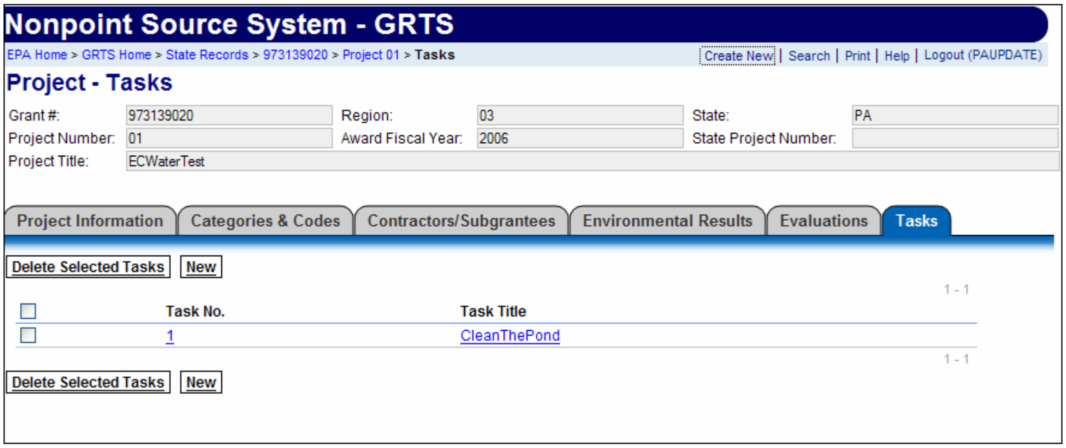
To edit an *Evaluations* listing*:*

1. Click [Edit] next to the *Evaluations* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Evaluations* list page. The changes are displayed in the list.

Working with Tasks

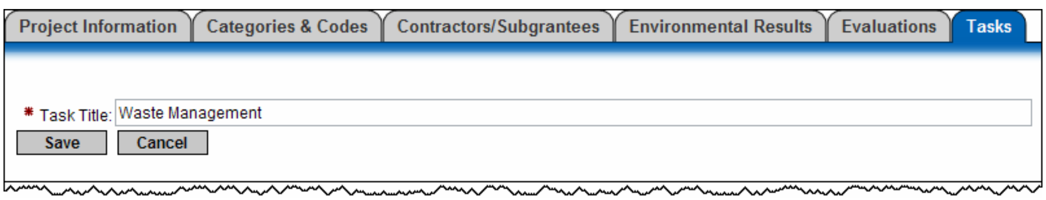
Tasks are work assignments that are created to break down activities to be accomplished during the project lifecycle. Tasks can be accessed or created via the *Tasks* tab on the *Projects Details* page for a specific project, or from the *Grants Details* list page for those tasks that have already been established.

Click on the **Tasks** tab on the *Grants Detail* page, to open the *Tasks* list page.



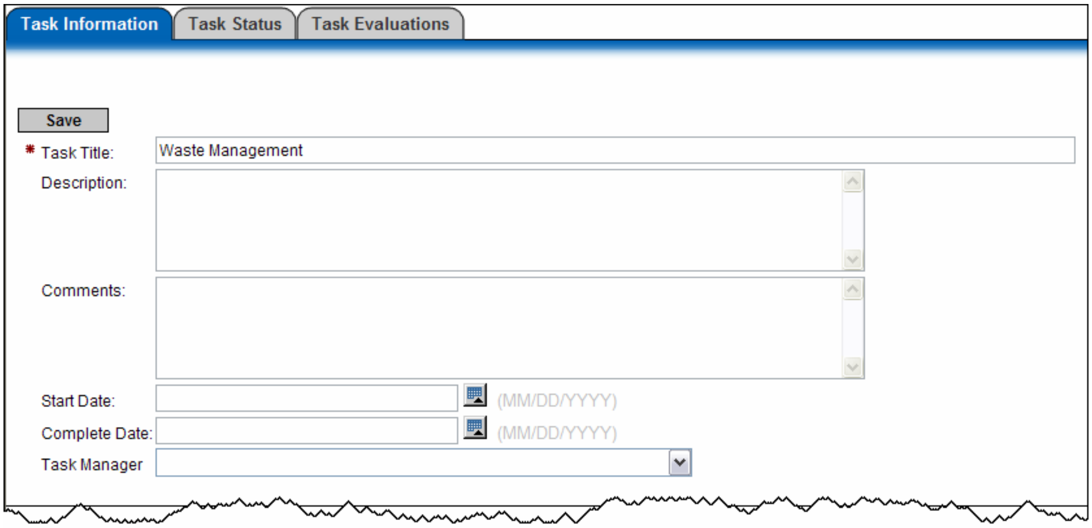
Creating a New *Task*

1. Click New; the *Create New* page opens.



2. Enter a title for the *Task* you wish to create.
3. Click Save; the new *Task* title is saved and *Task Information* page opens with three tabs displayed:
   - ✓ *Task Information* – This tab is on top when a new task is created and is for entering information about the task.
   - ✓ *Task Status* – A list page showing all tasks currently defined
   - ✓ *Task Evaluation* – Information related to the progress of this task

Task Information tab

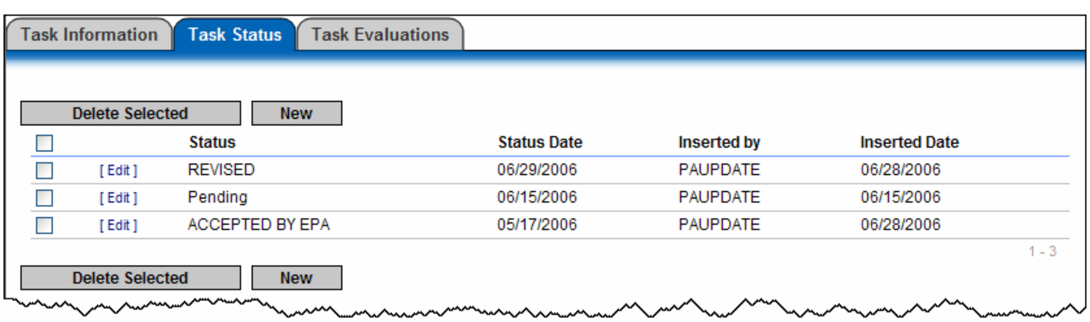


Column	Description
Task Title	The Title given to this task on the *Create New* page
Description	A description of what is to be accomplished by this task
Comments	Any comments relative to this task
Start Date	Enter a date for this task to be started
Complete Date	Enter a date for this task to be completed
Task Manager	Select a manager from the drop down list

1. Using the descriptions in the table, click in the fields to enter information relevant to this *Task*. The only *Required* field is *Task Title* which is already filled in based on the title assigned on the *Create New* page. The *Task Title* can be modified on this page.
2. Click Save; the new data is stored and this tab remains open.

Task Status tab

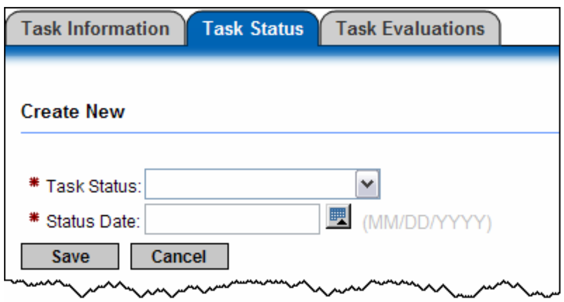
The *Task Status Tab* lists status information for this *Task*. You can create new, delete, and edit *Task Status(s)* on this page.



Column	Description
Status	Current Status for this *Task* to be selected from a list
Status Date	The calendar date this status is effective
Inserted By	The user account that established the record
Update Date	The calendar date the record was created

To enter a *Task Status*:

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table select the *Task Status* from the drop-down list, and enter the *Status Date* using the calendar icon or enter the date in the format displayed next to the field.



Note: Both fields are required.

3. Click Save; the *Create New* page closes and returns you to the *Task Status* list page. The new *Task Status* displays in the list and a message indicating the update was successful displays on top.

To Delete a *Task Status*:

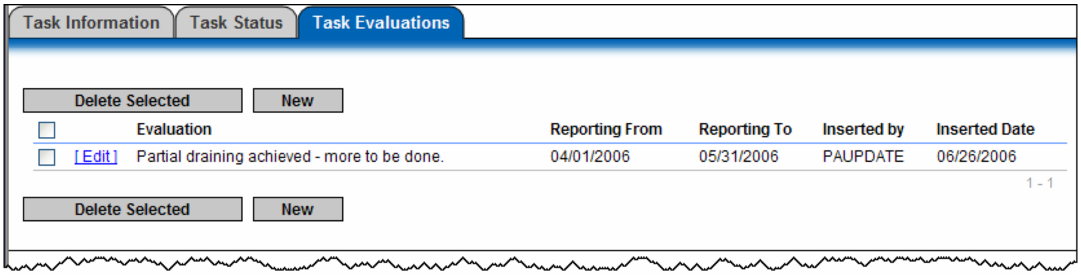
1. Click in the square next to the *Task Status* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit a *Task Status* listing:

1. Click [Edit] next to the *Task Status* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Task Status* list page. The changes are displayed in the list.

Task Evaluations tab

Click on this tab to open a page for identifying evaluations and supporting data for the project.



Column	**Description**
Evaluation	Description of the evaluation
Reporting From	Starting date of the evaluation period
Reporting To	Ending date of the evaluation period
Inserted By	The user account that established the record
Inserted Date	The calendar date the record was created

To enter a *Task Evaluation*:

1. Click New; the *Create New* page opens.
2. Using the field descriptions in the above table fill in the necessary information for this *Task Evaluation*.
3. Click Save; the *Create New* page closes and returns you to the *Evaluation* list page. The new *Task Evaluation* displays in the list and a message indicating the update was successful displays on top.

To Delete a *Task Evaluation*:

1. Click in the square next to the *Task Evaluations* listing(s) you wish to delete to select it.
2. Click Delete Selected; the selected listing(s) is deleted and removed from the list.

To edit an *Evaluations* listing:

1. Click [Edit] next to the *Evaluations* listing you wish to modify; the *Edit* page displays.
2. Make the desired modifications.
3. Click Save; the information is stored and you are returned to the *Task Evaluations* list page. The changes are displayed in the list.

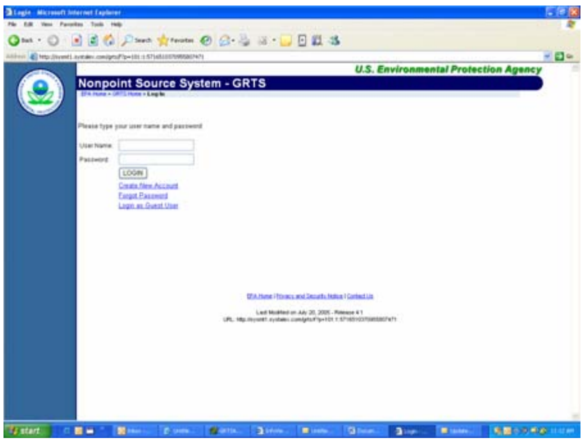
Business Objects Reports Cheat Sheet

Purpose:

A quick how-to guide for choosing and launching pre-defined GRTS reports and how to design and deploy an ad hoc report in GRTS.

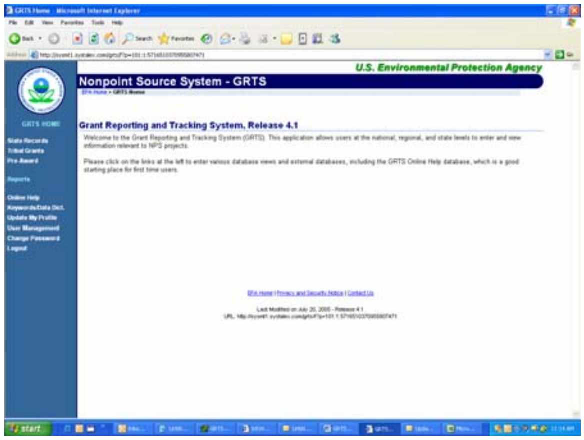
Prerequisites:

The HTML DB application and BusinessObjects application are launched from the user's browser, requiring Internet Explorer 6.0 or higher. The user also must have an account, including a username and password, in order to launch the HTML DB application "Nonpoint Source System – GRTS". See system administrator for this access. The log in screen appears as shown below.

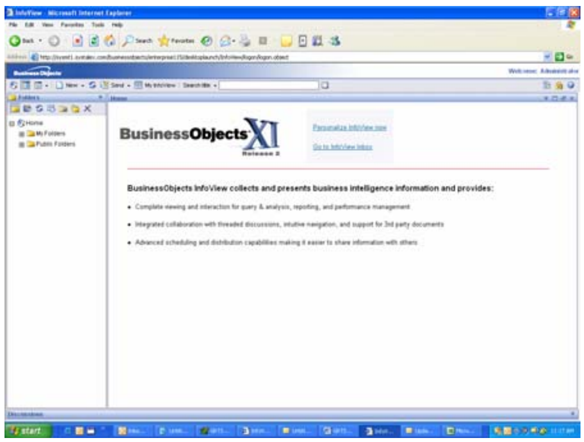


How to Deploy the Pre-Defined GRTS Reports.

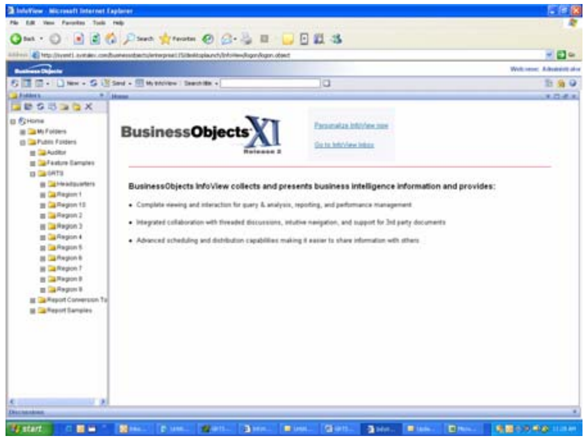
1. After log in, the user will see the page shown below. Along the left margin is the item "Reports". Single click that item.



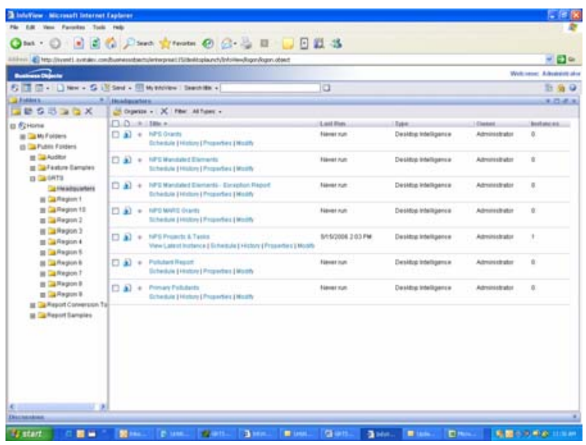
2. The Business Objects "InfoView" application will be launched as shown below. InfoView is the application through which parameters are chosen, reports are launched and the resulting reports directed to the user's desired output medium (printer, pdf file, email, etc.)



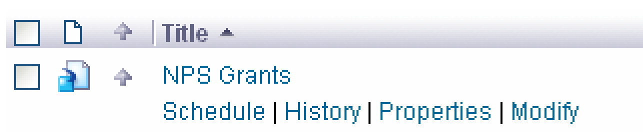
3. Along the left margin of the InfoView window are two folders under the "Home" icon. Expand the "Home" folder (if necessary) by clicking on the adjacent "+" symbol. The main GRTS reports are found under the "Public Folders" hierarchy. "My Folders" is available to each individual user as a place to copy and store frequently-used reports for quick access. "My Folders" is initially empty. Expand "Public Folders" by clicking on the adjacent "+" symbol. Then expand the "GRTS" folder that appears, with the resulting display as shown below.



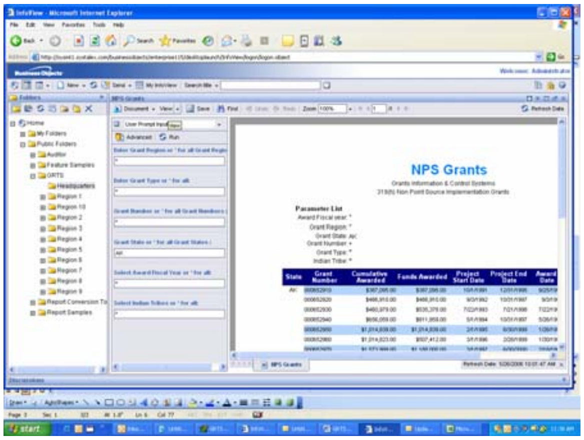
4. A folder for each EPA region and Headquarters has been set up. Click on the "Headquarters" folder (the folder icon itself) and all available GRTS reports appear in the right pane, as shown here.

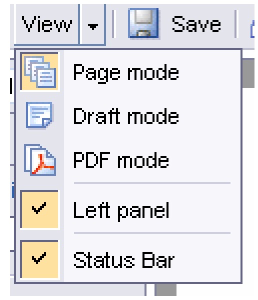


5. The reports are listed in alphabetical order by title, with several options for deploying them listed below each title. To run a report immediately, with initial (default) parameter selections, simply click on the name of the report. Example: Click on the first report, named "NPS Grants" appearing as shown here.



6. The running report requires a short time to gather and assemble the data, after which the report itself appears similar to what is shown here depending on the user's viewing selections. Click the "View" button in the left pane the toolbar and see the resulting drop down items,

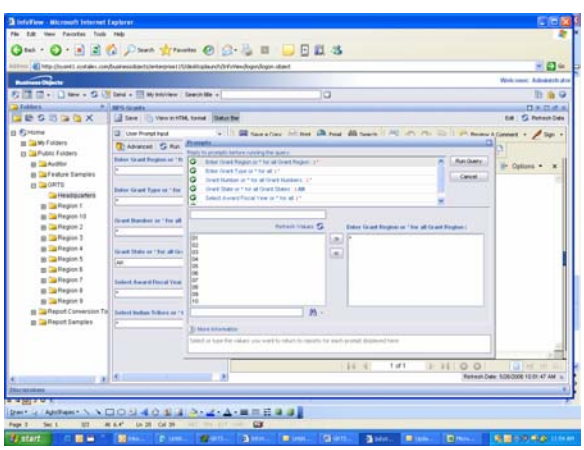




The user can choose among these “View” button items to explore the various report viewing options InfoView provides, which include viewing the report in HTML mode or as a pdf document, along with various other available options for viewing or hiding auxiliary information. In the view shown above, the report is displayed in HTML page mode with the left panel (showing report parameters) displayed.

Using the above example, the user can make several choices at this point. The report can be displayed as is and saved as a pdf file, recommended for emailing and compatibility with Adobe pdf-based applications. With the left pane displayed, the user can readily see the set of parameters used for running the report (these parameters are also listed on the first page of each report). If this set is not the desired set, the user can readily rerun the report, by clicking on the “Refresh Data” button at the right end of the toolbar.

This refresh action will present the user with a parameter selections page, allowing the user to select a fresh set of runtime parameters as shown here. How to choose parameters is straight-forward, following the embedded on-screen instructions. When an acceptable set of new parameters has been chosen, hit “Run Query” and the report will be refreshed.



7. To dismiss the current report, and go back to the list of all reports, click on the "X" icon at the far right side of the tool bar.

When the "X" icon is clicked the user is returned to the InfoView report selections page to begin again.

8. Other issues of note: On the reports selection as mentioned earlier, are other options available for each report. They are:

"Schedule/History/Properties."

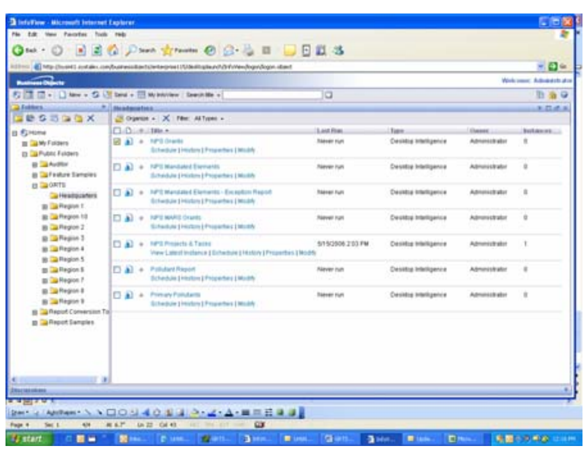
Schedule: The user can select this and follow the on-screen guide for running the selected report according to a chosen schedule.

History: when a repot is run on a "scheduled" basis, the history and status of those scheduled reports runs are shown here.

Properties: Various report properties are shown.

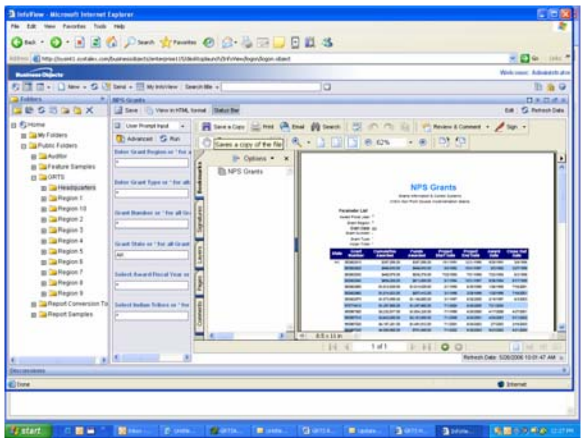
In each case, clicking on the "X" icon at the far right side of the tool bar returns the user to the list of available reports.

9. Use of "My Favorites" folder. From the list of available reports, a given report can be copied to the "My Favorites" folder by a) clicking the box adjacent to the desired report as shown here. b) click on the "Organize" button at the left end of the toolbar. c) choose "copy to new folder". d) follow the on-screen guide for placing a copy of the chosen report into any desired folder, creating new folders or subfolder, within the existing hierarchy, etc.)



10. Sending and Saving Reports: See the "Save a Copy" button on the report toolbar as shown here.

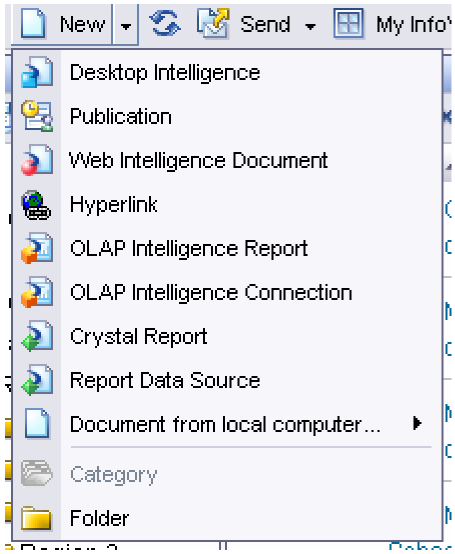
Clicking this button allows the user to save a copy of the report – in either HTML or pdf format – to a desired filed location, using standard Windows navigation and file organization practices. The user can explore other buttons along the report toolbar for other options available for emailing, printing, reviewing the displayed report.



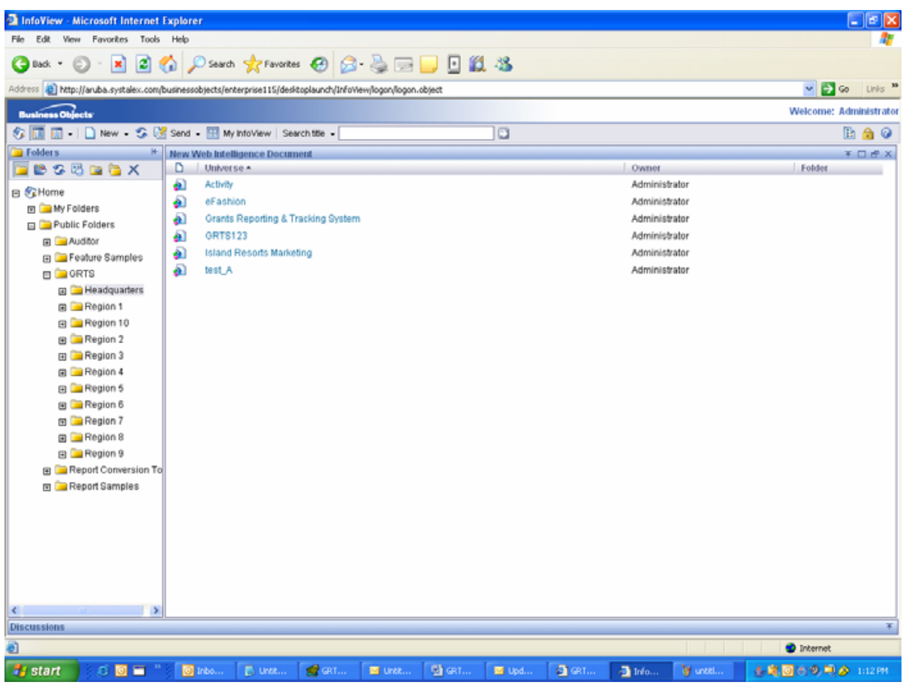
Creating an Ad Hoc Report Using BusinessObjects "Web Intelligence" Report Design Tool

The GRTS Application allows the user to easily design and deploy their own adhoc GRTS report by providing the necessary interface to BusnessObject's "Web Intelligence" report design tool. This tool allows the user to drag and drop into a report, items from a displayed hierarchy of GRTS items called the "Grants Reporting & Tracking System" universe. The items in this universe have been pre-defined and formatted to be the items most likely for a user to want to display. Steps for designing an ad hoc report are as follows

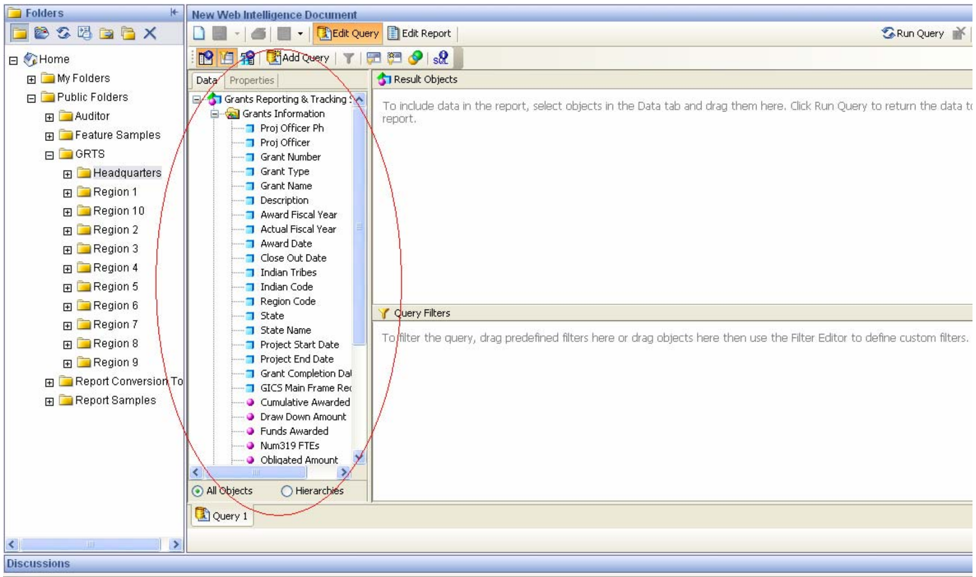
1. Starting from the InfoView reports selection page, click on the "New" [report] selection button at the left end of the BusinessObjects toolbar as shown here. The resulting drop down list includes the item "Web Intelligence Document". Select that.



2. A page will open up allowing the user to select the desired universe from a list of available universes as shown here. Choose “Grants Reporting & Tracking System”.

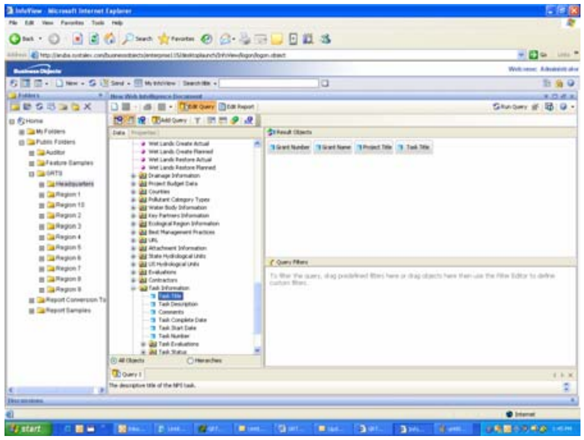


3. The Web Intelligence design application tool will launch and result in the page shown here.



In the Data pane highlighted above, GRTS-familiar entities and database items should appear. They are arranged in a logical hierarchy, showing projects beneath grants, tasks beneath projects, etc.

4. The pane on the right has two sections. The user drags-and-drops objects from the Data pane at the immediate left, into the upper section [Result Objects] of the pane at the right. For instance, suppose the user wishes to design a report showing a list of grants with their associated projects and tasks. The user would start by doing a mouse left button click-and-hold on the “Grant Number” object in the Data pane highlighted above. While holding the button down on this object, the user moves the mouse over to the upper “Result Object” pane and releases the mouse button. The first report column has bow been placed and defined. The user might then wish to see the text name of that grant for reference. The user would then follow the same process to drag-and-drop the “Grant Name” object into the Result Objects section. The object will automatically fall to the right of the existing “Grant Number” object, and similarly, it will be displayed in the resulting report to the right of “Grant Number”. Scrolling down the Data pane hierarchy, the user would then locate the “Project Title” object, expanding the “Project Information” folder as necessary for find the desired object. This object is then dragged-and-dropped into the Result Objects pane. It falls to the right of the growing list of report objects. Finally, the user drags-and-drops the “Task Description” object expanding the “Task Information” folder as necessary to find it. The resulting Web Intelligence screen should now look like the view shown here with the fours desired objects side-by-side and in order.



5. The user could run the report at this point to see what it looks like. Click on “Run Query” at the right end of the toolbar.

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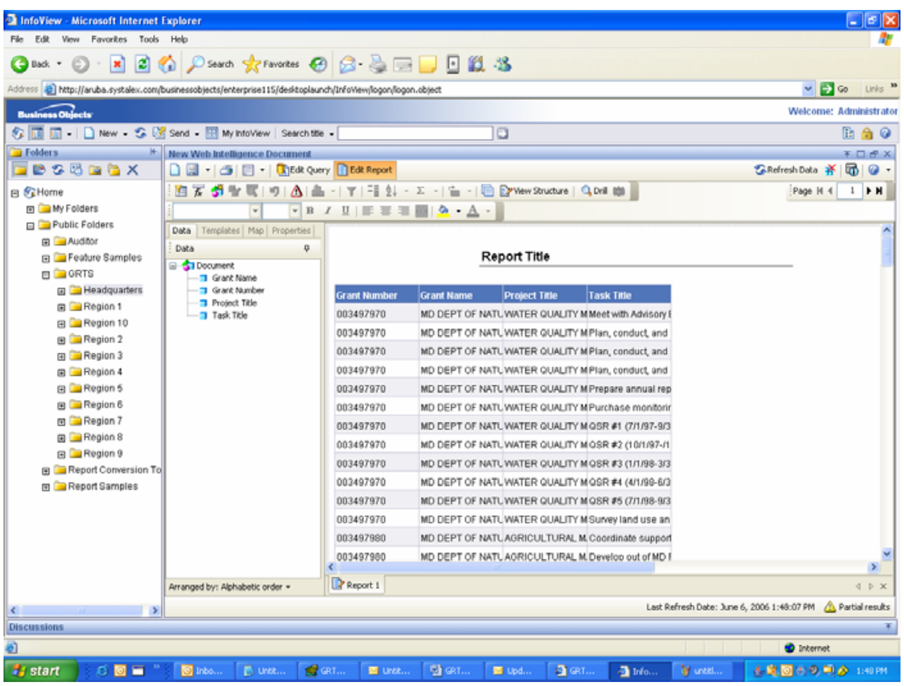
The resulting report will require a short time to gather and arrange the requested data , during which the user will see a runtime indication. The resulting report will look rough and unformatted, something like what is shown here.

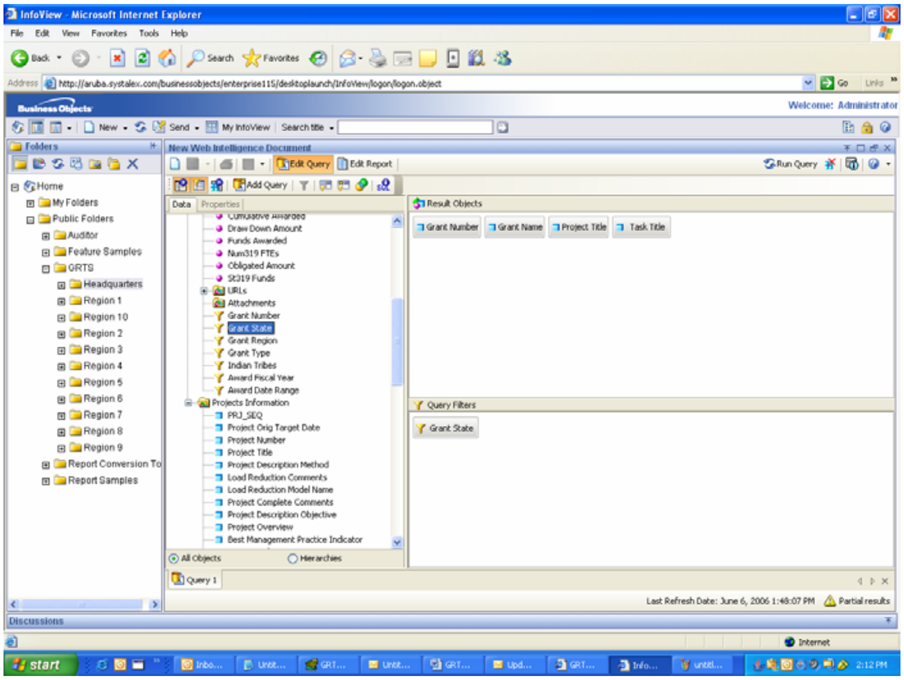


6. This rough report provides the framework that can now be formatted and adjusted to the user’s needs. First, a real title can be created by double clicking on the “Report Title” box and typing in the selection box a title the user really desires. Next, the columns are

truncated and merged and need to be spread out. To do this, the user moves the mouse cursor to the line separating adjacent columns in the column header row (shaded, at the top of the table). The mouse cursor become an arrow which the user then user to “grab” a column and spread it out or condense it, going back and forth as needed. When the desired width is found, the user releases the mouse button. The same procedure is performed on all columns until all data ceases to be truncated and an aesthetically pleasing display is achieved. The techniques for widening/narrowing columns and widening/narrowing rows within the column are very similar to the same processes performed for an Excel spreadsheet. The user will also quickly see other text definition, formatting, bordering, and shading tools which work the same as in all standard Microsoft applications, making it easy to render the report into a desired form.

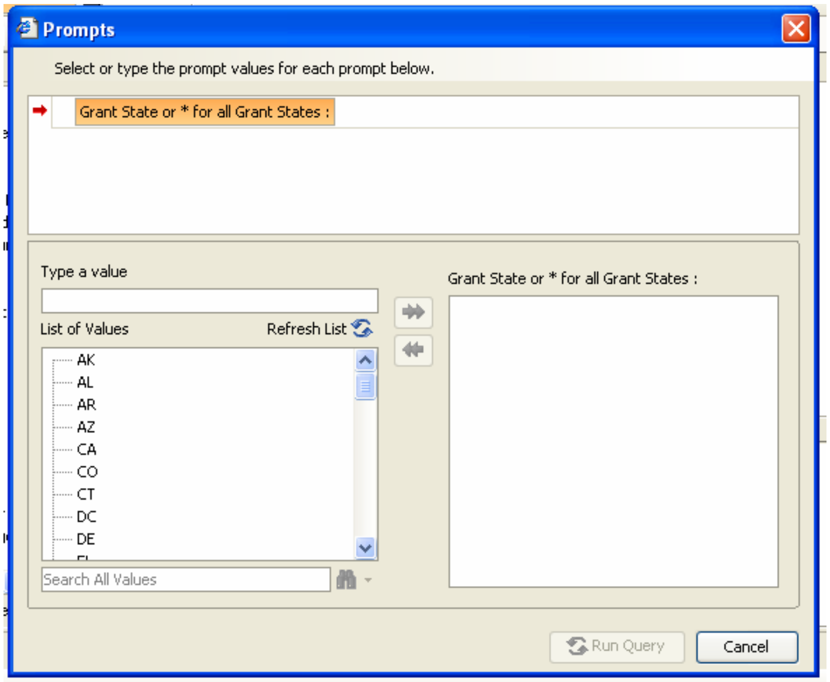
7. Query Filters: The example report created so far contains all grants and all projects/tasks under the jurisdiction of the EPA throughout the US and will likely go for hundred of pages. The next step in report creation is to design a set of filters to drill down to the desired dataset and eliminate all other, unnecessary data. Filters are created and applied as easily as the initial column selection. Suppose the user only wants to see, for instance, grants information for the state of Mississippi. Click the “Edit Query” button on the Web Intelligence toolbar which appears as shown here.

8. The user will be returned to the familiar multi-panel design screen with the Data pane on the left and the two-section design pane on the right as shown in step 4) above. This time the user will add items to the bottom section, called the “Query Filters” section. The user will notice objects in the Data pane with yellow funnel-shaped icons adjacent to them. These are the report filters that were defined when the GRTS universe was created to be the most useful filters for user community needs. The user will see several of these filter objects at the bottom of the “Grants Information” folder. One is called “Grant State”. Since we wish to filter the report data down to a particular state, the user would click-and-drag this filter object over to the right and drop it into the “Query Filters” section, resulting in the arrangement shown here.

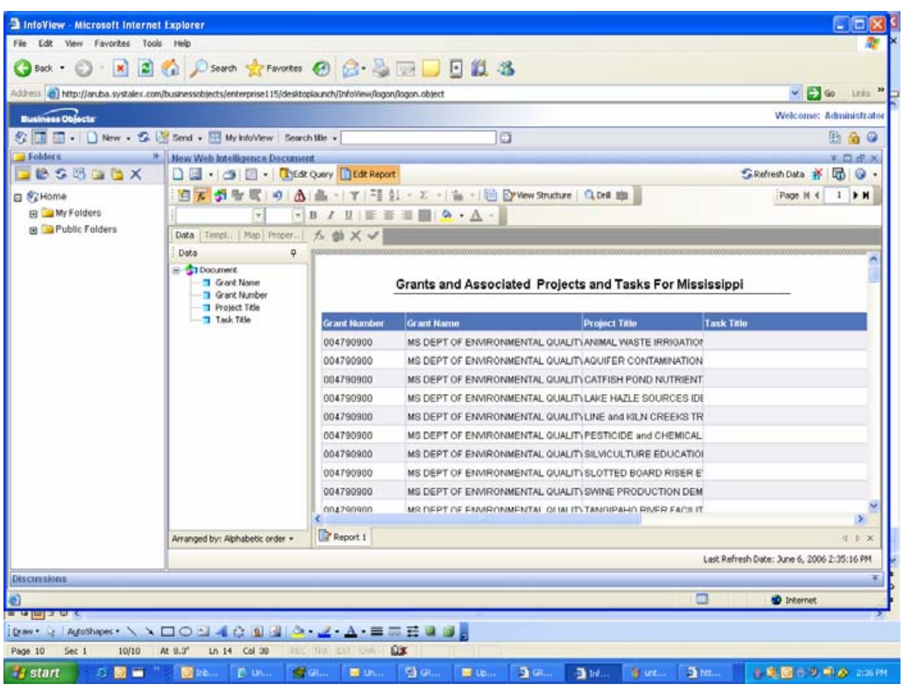


9. Run the report again, by clicking “Run Query”

This time, since a filter is in place, a Prompt screen will appear as shown here. Via this screen, the user will select Mississippi in either of two methods. If the user knows apriori that “MS” is the state abbreviation, then he/she can simply type “MS” in the “Type a value” box and hit “Enter”. Otherwise the user can scroll through the List of Values, choosing the desired entry, and clicking on the right-pointing double arrow, meaning “move this object into my list of desired filters”. After “MS” appears in the lower right pane, hit “Run Query” in the lower right corner.



10. Again, the report will take a short time to process the request and arrange the data, but this time only the data for Mississippi will appear. As before, the title could be altered to reflect the exact data set shown in the report. The result could look something like that shown here.



11. Finishing the Report: Other filters could be applied, other data displayed, in an iterative process until the user is satisfied with the report. Once the report is ready, the user can

do several things with it, but most likely he or she will want to save it somewhere and/or print it. See the adjacent disk and printer icons at the left end of the toolbar

Clicking on “Save”, the user will see two choices. One choice will save the report to the GRTS repository, to whatever folder the user desires, including his “My Favorites” folder. The other choice allows the user to save the report to his/her computer as either an EXCEL spreadsheet or a pdf file.

Clicking on “Print” leads the user to save the reports as file in pdf format suitable for printing.

12. After all processing, saving, and printing of the report is finished, the report is dismissed by clicking on the “X” icon at the far right of the tool bar and the user is returned to the basic BusinessObjects InfoView page.